



Tobacco smoking and tobacco cessation in 2016

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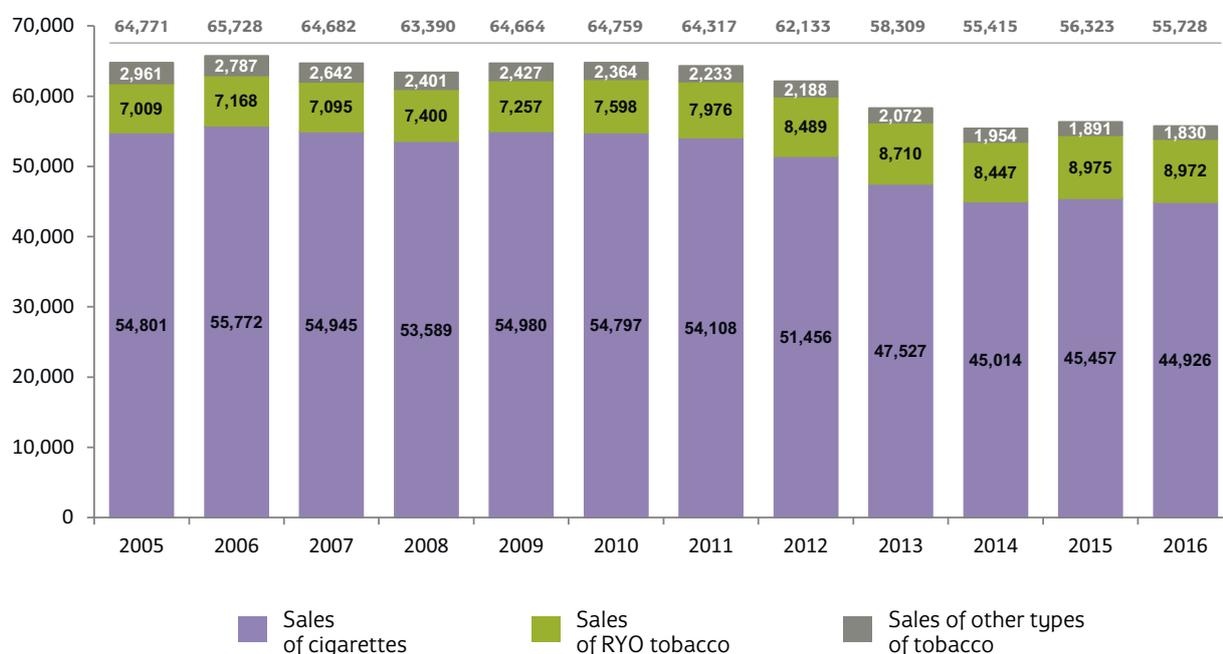
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Since April 2004, the French Monitoring Centre for Drugs and Drug Addiction (OFDT) has been compiling various key indicators each month as part of a "review on tobacco". The annual report offers a concise overview of the changes occurring over the past year. The main findings for 2016, summarised herein², fall within a context characterised by numerous measures³ arising from the National Tobacco Reduction Programme (PNRT) and part of the health system reform law (known as the "health law") of 26 January 2016. This notably concerns the iconic measure, standardised tobacco packaging: since 20 May 2016, manufacturers have been obliged only to produce this type of packaging for cigarettes and roll-your-own tobacco, and to supply tobacco retailers and authorised sellers only with this packaging since 20 November. The obligation to sell cigarettes in this standardised tobacco packaging to smokers came into force on 1 January 2017. Furthermore, the "Moi(s) sans tabac" campaign took place for the first time in France in November 2016. This involves encouraging smokers, via a media and social network campaign, to join together to stop smoking for at least a month.

TOBACCONIST NETWORK SALES IN MAINLAND FRANCE ARE ON THE DECLINE

While 2015 was characterised by the first rise in tobacconist network sales since 2010, this trend reversed in 2016. Official sales are on the decline and have more or less reached their 2014 level. Sales amounted to 55,728 tonnes in 2016 versus 56,323 tonnes the previous year, i.e. - 1.1%. This reduction has two characteristics. Firstly, it can almost entirely be attributed to the decline in manufactured cigarette sales (80% of the market with 44,926 tonnes), as roll-your-own tobacco has practically remained stable (8,972 tonnes). Secondly, this effect primarily came into play during December. Although sales were approaching stability, the month following the implementation of standardised tobacco packaging and the "Moi(s) sans tabac" campaign resulted in a clear break from this trend. Cross-border tobacco purchases do not appear to have increased. These seem to be stable at least, or may even be declining, particularly at the Belgian border, as tobacco prices rose in Belgium at the beginning of 2016. Overall tobacco sales thus seem to show a slight decline: 18.0 billion euros in 2016 vs. 18.2 billion in 2015.

Total tobacco sales (tonnes) and distribution between cigarettes, roll-your-own (RYO) tobacco and other types of tobacco (source: DGDDI)



1. Sales figures are provided by the French Customs Authority (DGDDI), data on smoking cessation treatments by the Group for the Production and Elaboration of Statistics (GERS) and data on specialist tobacco treatment services by CDTNet, a computerised scheme comprising approximately one hundred tobacco treatment units and smoking cessation clinics. The figures relating to the "Tabac Info Service" (Tobacco Information Service telephone helpline, TIS) scheme, together with "Moi(s) sans tabac" and information on media campaigns were provided by *Santé publique France*.

2. The "Review on tobacco" monthly issues (in French) and summarised [2015 data](#) (3 pages in English) are available on the OFDT website.

3. Banning of advertising at sales outlets, prohibition of smoking in parks and in vehicles in the company of minors, authorisation given to municipal law enforcement services to monitor the prohibition of sales to minors and smoking in public spaces, joint approval of tobacco prices by the Ministry of the Budget and the Ministry of Health, etc.

THIS DECLINE IS ACCOMPANIED BY THE ONGOING RISE IN INDICATORS RELATING TO CESSATION

Sales of smoking cessation treatments are on the increase (+ 16.5%), the main treatments still being oral substitutes ahead of patches, accounting for more than 90% of the market.



Smoking cessation services and online/telephone support services (Tabac info service) have received more queries from smokers, with extensive activity surrounding the "Moi(s) sans tabac" campaign in November.

The "Moi(s) sans tabac" campaign is a collective challenge, inspired by the "Stoptober" (a combination of "Stop" and "October") campaign in Britain, conducted for the first time in France in 2016: smokers set themselves the common goal of stopping smoking for at least a month, thereby increasing their chances of stopping permanently. Initiated by the Ministry of Health, the National Public Health Insurance Fund (CNAM) and *Santé publique France*, "Moi(s) sans tabac" was supported by a vast media campaign (television, radio, web and mobile), extensive coverage in the press, along with local actions organised by national or regional partners, and also healthcare professional involvement, particularly via a partnership with pharmacies. This operation led to a 2.2-fold rise in the number of calls to the Tabac info service (TIS) telephone quitline compared with November 2015, while tobacco treatment specialists working with this service handled 12.6% more calls. It should, however, be pointed out that the main vehicle for this campaign was not the telephone line but rather the website, with more than 180,000 smokers having registered. Lastly, the social network, particularly the [Facebook page](#) launched to coincide with "Moi(s) sans tabac", allowed smokers to share their experiences and support each other in stopping smoking.

Furthermore, the www.tabac-info-service.fr website, created by INPES (former *Santé publique France*) in 2005, received 40% more visits compared with 2015. In order to adapt to growing smartphone use, *Santé publique France* developed a mobile app (launched in January 2015), with a coaching service which recruited nearly 85,000 smokers between January and July 2016. In September 2016, the CNAM and *Santé publique France* launched a new version of this app: it was downloaded more than 111,000 times between September and December 2016.

ABOUT ELECTRONIC CIGARETTES

The French electronic cigarette market, which has experienced exponential growth since 2012, appeared to level off in 2015. In 2016, according to professionals in the vaping industry, the number of specialist store closures has declined (400 versus 677 in 2015); however, fewer new stores are opening (229 versus 400 in 2015): the number of sales outlets specialising in electronic cigarettes has thus fallen by 6%⁴. Although this decline seems less significant compared with 2015, the market does not yet appear to have completely stabilised. In mainland France, there is one specialist store per 20,000 to 30,000 inhabitants, versus one tobacco retail shop per approximately 2,600 inhabitants. Nevertheless, the market⁵ does not simply rely on stores since some brands are only sold in tobacco retailer networks (particularly those created or taken over by the tobacco companies) and there is an extensive Internet supply, particularly in terms of e-liquids. Current e-cigarette use fell between 2014 and 2015, whereas the proportion of non-smokers among vapers increased⁶.



4. [PGVG Magazine](#), 2017, no. 17, January/February

5. Observation of this market is complicated by the diverse stakeholders and lack of a centralised system.

6. Spilka S., Le Nézet O., Mutataji C. and Janssen E. (2016) [Drug use during the "lucée years": Results of the 2015 ESPAD survey in France](#). *Tendances, OFDT*, n°112, 4 p. and Andler R., Richard J. B., Guignard R., et al. (2016) [Tobacco consumption and e-cigarette use in France in 2015: preliminary results from the 2015 Cancer Barometer](#). *BEH*, n°30-31, pp.502-507

NEW EPIDEMIOLOGICAL DATA

These observations for 2016 may be placed in perspective with the limited new epidemiological data available. While the results of the ESPAD (European School Project on Alcohol and other Drugs) highlighted lower levels of use among *lycée*⁷ students, 2015 Cancer Barometer data report stable tobacco smoking among adults⁸. New survey results are expected in 2017: from the 2016 Health Barometer survey compiled by *Santé publique France*, along with the conclusions of the 2016 ATLAS survey (DGDDI and MILDECA, analysed by the OFDT) on the supply of tobacco to French smokers.

CONCLUSION

Tobacco sales have once again showed a downward trend in 2016; however, in the absence of price increases in the past three years, tobacco retailer sales volumes have remained relatively stable compared with 2014, in line with the pattern already observed (price stagnation, sales stability) in the second part of the 2000s. Moreover, there was an upward trend in sales until November, before the sudden collapse in December 2016, most likely due to the combination of two exceptional events: the mass arrival of standardised tobacco packaging at tobacco retailers and the first edition of the "Moi(s) sans tabac" campaign. In any case, the decline in tobacco sales in 2016 is not due to a rise in cross-border purchases. Although the sales volume has stabilised, the roll-your-own tobacco market is continuing to grow, with a negative impact on cigarettes and other types of tobacco. This changeover to roll-your-own tobacco is thus continuing, and is only likely to stop when the price per gram is identical for both product categories. The increase in roll-your-own tobacco tax, which came into force on 20 February 2017, is along these lines: the 15% price increase brings the most widely sold pack to €11.60⁹ versus €9.85 previously, but does not fully absorb the difference compared with cigarettes in terms of price per gram.

In this context where the French public authorities are rallying against tobacco use, all of the indicators for smoking cessation initiatives suggest an improvement: higher sales of smoking cessation treatments, smoking cessation services and online/telephone support services (*Tabac info service*) receiving more queries from smokers and the extensive action surrounding the "Moi(s) sans tabac" campaign in November 2016.

7. The "lycée years" correspond to the last three years of secondary school, from "seconde" to "terminale", which would be the equivalent of years 12 and 13 of Sixth Form College in the UK and grade 10 through to grade 12 of High School in the United States.

8. See footnote 6.

9. The most widely sold brand of roll-your-own tobacco is supplied in 40-gram packs: the price per gram thus reached 29.6 cents in 2017, but is still less than the cheapest cigarettes (32.5 cents). The price of cigarettes should also have increased to offset the creation of a tobacco distribution tax; however, the tobacco companies preferred to eat into their margins so as to keep the end consumer price the same (aside from a few exceptions).

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