

Tobacco smoking and tobacco cessation in 2018

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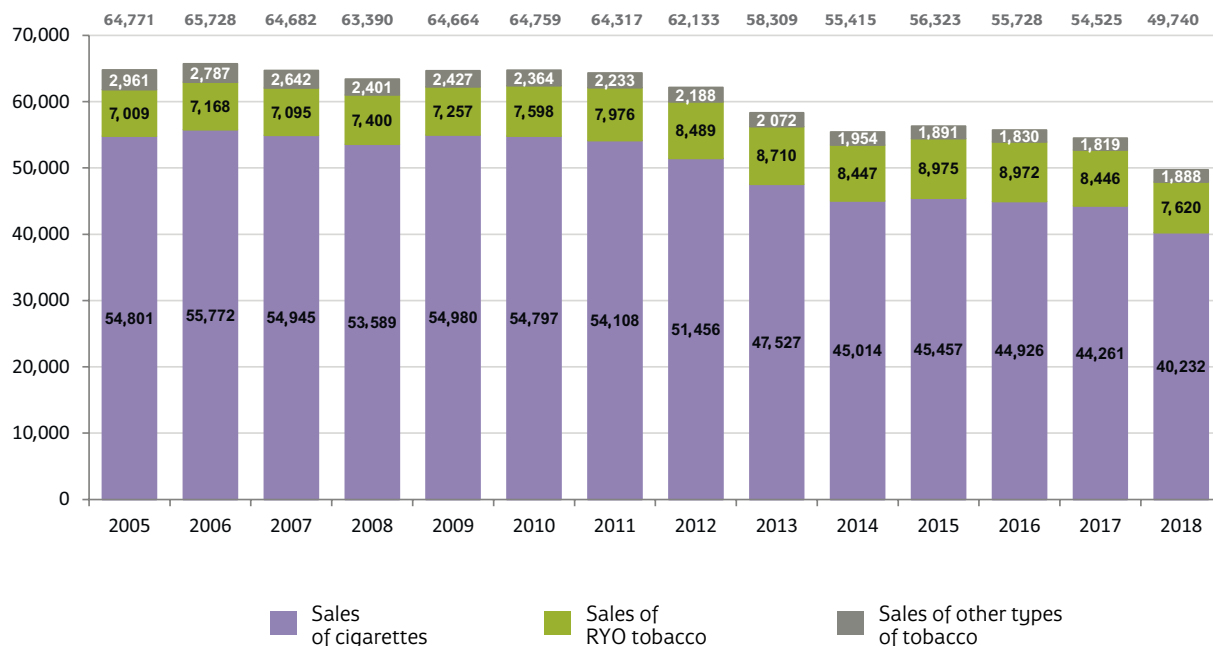
The annual overview of the “tobacco review” published by the French Monitoring Centre for Drugs and Drug Addiction (OFDT) since 2004 summarises the changes over the past year. This document brings together various key indicators on tobacco sales in the tobacconist retailer network, sales of tobacco cessation treatments and the use of tobacco cessation services¹. The key findings for the year 2018, marked by a significant increase in prices on 1 March², among the measures of the National Tobacco Control Program (*Programme national de lutte contre le tabagisme* or PNLTL) launched in May, following the announcement of a 1 million decline in the number of smokers between 2016 and 2017, are summarised below. The [2018 annual overview](#) (only in French) is available online on the OFDT website, along with a [summary](#) (in English) of the 2017 overview.

TOBACCONIST NETWORK SALES FELL BELOW 50,000 TONNES

In 2018, after almost four years (2014-2017) of relative stability, the volume of sales fell below the 50,000-tonne threshold. Tobacco sales in the metropolitan tobacconist network (excluding Corsica) stood at 49,740 tonnes in 2018, compared to 54,525 tonnes in 2017, which represents a sharp decline of 8.8%. Cigarette sales (80% of the market with 40,232 tonnes) are down 9.1% and sales of roll-your-own (RYO) tobacco down 9.8%. In contrast, the market for other types of tobacco (cigars, cigarillos, pipe tobacco and hookah, snuff and chewing tobacco, etc.), which had dropped by 23% between 2010 and 2017, rose by 3.8%. This increase is mostly driven by pipe and hookah tobacco (or shisha: +30% approximately).

These developments are the direct outcome of the price increase implemented on 1 March 2018. Given the significant reduction in the price gap per gramme between cigarettes and RYO tobacco (with the price of the latter increasing proportionally more), other forms of tobacco may in turn be subject to carryover strategies from one product to another, so as to favour the least taxed and the least expensive

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) and data on smoking cessation treatments by the Group for the Production and Elaboration of Statistics (GERS). The figures relating to the Tobacco Information Service (TIS) telephone helpline/website and #MoisSansTabac are provided by *Santé publique France*.

2. The average increase for a pack of 20 cigarettes has been 94 cents, bringing the average price up to 7.90 euros; and a pack of 30 grams of RYO tobacco has gone up by 2 euros, which makes for an average price of 10.50 euros.

Cross-border tobacco purchases could have increased in 2018, since the decline of sales at tobacconists in border areas is more marked than at the national level (-11% to -14%). Nevertheless, overall turnover for tobacco products increased sharply in 2018, amounting to 19 billion euros.



INITIATIVES TO QUIT SMOKING ARE AT AN UNPRECEDENTED LEVEL

Already largely on the rise between 2014 and 2017, sales of treatments to help quit smoking rose a further 25% in 2018. As of now, the estimated figure of people who have undergone a treatment is twice as large as in 2014-15. The rise is particularly pronounced for sales of transdermal patches (+49.8%), which have thus become the most widely used type of treatment ahead of oral forms (47% vs 46%), as well as for Champix® (varenicline tartrate: +88.4%).

The increase recorded in 2018 may be largely explained by the implementation of the 65% rebate for tobacco cessation treatments by the Health Insurance Authority (a measure of the National Tobacco Control Program, PNL 2018-2022), which has gradually replaced the flat rate of 150 euros per year per person. More than a mere replacement of one modality by the other, the inclusion of these treatments as part of ordinary care by the Health Insurance Authority has helped reduce the formalities for smokers and substantially increase the number of beneficiaries. As such, in the month of December 2018 alone, over 115,000 French citizens benefited from a refund, while they were just 100,000 for the entire final quarter of 2017.

For its part, use of the Tobacco Information Service telephone helpline/website has kept noticeably increasing (+20% for calls handled by tobaccologists and +33% on the website). This momentum appears to be especially linked to the third edition of the #MoisSansTabac³ ('Month without tobacco') in November, for which 242,000 people signed up on the website (vs 158,000 in 2017). In addition, the mobile app was downloaded almost 318,000 times in the course of the year, including 95,500 times during #MoisSansTabac.

Focus on electronic cigarettes

At the end of 2018, the number of specialist shops in France stood at 2,811, which is about 7.5% more than in 2017 (source: PGVG magazine). According to research firm Xerfi, the French market for e-cigarettes stands at nearly 820 million euros (+21% compared to 2017), divided into 60% for e-liquid and 40% for hardware, in a sales system still dominated by specialist retailers (55% of sales).

At the same time, the prevalence of e-cigarette use remained stable between 2016 and 2017⁴ : 3.8% of French people aged between 18 and 75 used it, including 2.7% on a daily basis. The decline in tobacco use does not therefore seem to be linked to the increased use of e-cigarettes. However, vapers may have increasingly become exclusive users of e-cigarettes, a trend already seen between 2014 and 2016, which may contribute to the decline in the number of smokers in the French population.



3. Collective challenge, inspired by the British "Stoptober", with the common goal to quit smoking for at least a month, backed up by social networks (Facebook), pharmacies (18,000 pharmacy partners in 2018), as well as field activities led by local associations.

4. Source: 2017 Baromètre santé ('Health barometer') survey by *Santé publique France* among the French population aged 18 to 75 years.

CONCLUSION

In the wake of the 2017 findings, the year 2018 was marked by a sharp decline in cigarette and RYO tobacco sales in France's tobacconist network. However, a slight increase in other types of tobacco, less heavily taxed, can be seen, together with a likely increase in cross-border purchases.

In addition, all indicators related to quitting smoking are noticeably on the up, even more so than in 2017. Sales of treatments to help people quit smoking are at an all-time high, boosted by the implementation during the year of the systematic and non-capped reimbursement of prescribed tobacco cessation treatments. Moreover, use of the Tobacco Information Service telephone helpline/website continues to intensify and the 3rd edition of #MoisSansTabac has confirmed the operation's status as a highlight for smoking cessation among French smokers.

The above elements are part of a downward trend in the prevalence of use, such as emerged from the 2017 Health Barometer survey in particular. The publication of 2018 figures will supplement these observations.

On 1 March 2019, tobacco prices increased again and this will be followed by a further rise in November.

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