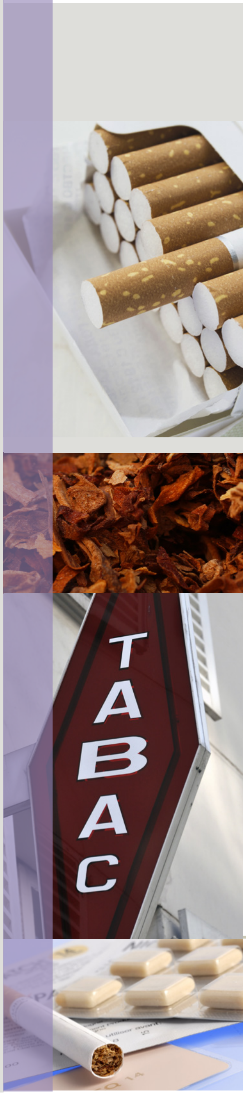

Tobacco smoking and tobacco cessation in 2017

Aurélie Lermenier-Jeannet, OFDT

OBSERVATOIRE FRANÇAIS DES DROGUES ET DES TOXICOMANIES

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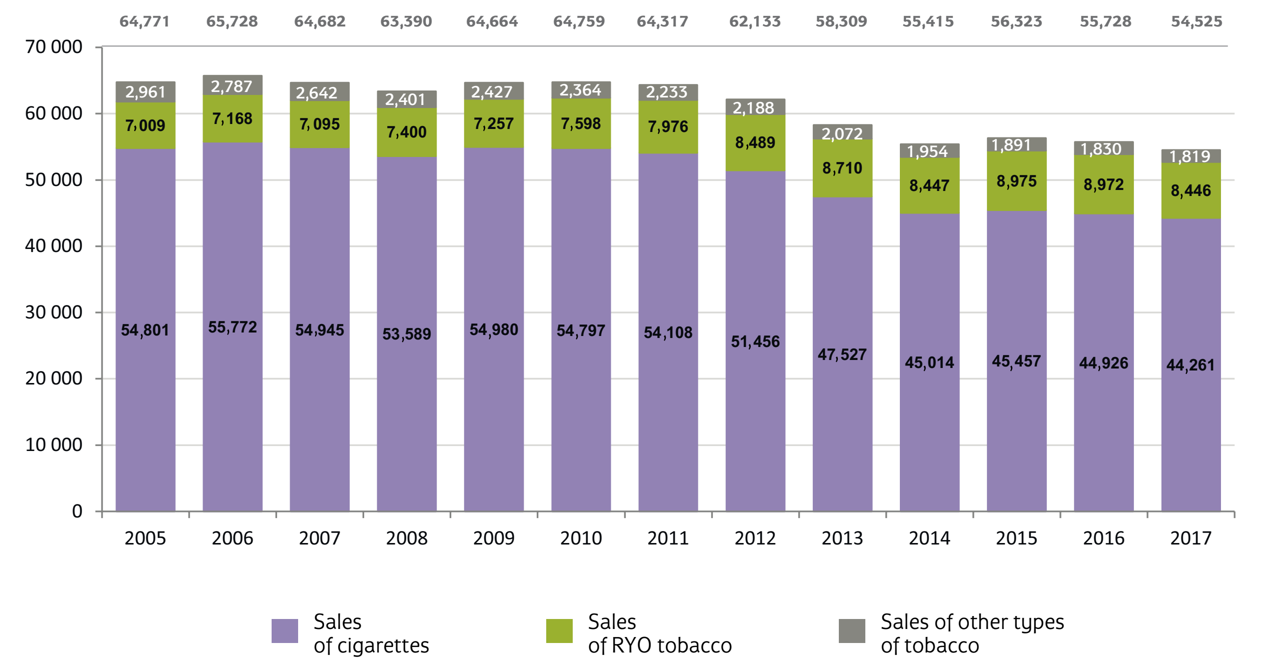
The annual overview of the "tobacco review" published by the French Monitoring Centre for Drugs and Drug Addiction (OFDT) since April 2004 summarises the changes over the past year. This document brings together various key indicators on tobacco sales in the tobacconist retailer network, sales of tobacco cessation treatments and the use of tobacco cessation services[1]. The main findings for 2017, characterised by the switch to the plain packaging, a symbolic measure introduced by the National Tobacco Reduction Programme (PNRT), and the second year of the #MoisSansTabac campaign (in November), are summarised herein. The 2017 annual overview (only in French) is available online on the OFDT website, along with a summary (in English) of the 2016 overview.

SALES IN THE TOBACCONIST RETAILER NETWORK ARE DECLINING, PARTICULARLY FOR ROLL-YOUR-OWN TOBACCO

Tobacco sales in the tobacconist retailer network in mainland France reached 54,525 tonnes in 2017 compared to 55,728 tonnes in 2016, i.e. a 1.4% reduction on a same-day basis. Cigarette sales (80% of the market with 44,261 tonnes) fell by 0.7% on a same-day basis. In contrast to the previous year, this reduction is, to a very large extent, driven by the decline in roll-your-own tobacco sales (-5.1% on a same-day basis), the market share of which fell from 16.1% to 15.5%; this decline is related to the 15% price rise in February 2017. In November 2017, several brands of roll-your-own tobacco and cigarettes were hit by a second, although fairly small, rise[2]. Sales of other types of tobacco (cigars, cigarillos, pipe tobacco, etc.) have remained stable on a same-day basis, breaking away from the trend observed in recent years (-22.6% over the 2010-2016 period). Cross-border tobacco purchases do not appear to have increased; growth in sales has even been observed among tobacco retailers close to Belgium (+0.3%), where prices increased in the first quarter of 2017. In short, tobacco turnover has remained stable: 18.06 thousand million compared to 18.0 thousand million euros in 2016.

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. In March 2018, the price per pack increased by just under one euro on average, based on government targets to raise the price per pack to 10 euros in 2020.

TOBACCO CESSATION INITIATIVES ARE STILL ON THE RISE

Already on the rise in 2015 and 2016, sales of tobacco cessation treatments increased by more than 28% in 2017. The market appears to have benefited from the measure introduced in November 2016, which set the annual National Health Insurance Fund reimbursement to 150 euros for all smokers. This increase is particularly apparent for patches (+44.7%) and Champix® (varenicline), sales of which doubled compared to 2016, owing to the renewal of its reimbursement by the Social Security scheme in May 2017. Conversely, despite continuing to represent more than half of the market (55%), oral nicotine replacement treatments have decreased. In total, more than two and a half million patients have received treatment, a growing number of whom benefit from the annual reimbursement scheme further to the prescription of these treatments by an authorised health professional.

Use of the Tobacco Information Service telephone helpline/website has risen sharply (+17% for the telephone helpline and +11% for the website). This impetus notably seems to be related to the specifically tailored resources (mobile app, downloaded 385,000 times in 2017) and the second year of the #MoisSansTabac campaign in November: this is a collective challenge, based on the British version "Stoptober", where the common goal is for participants to stop smoking for at least a month; 158,155 smokers signed up on the dedicated website (*versus* 180,000 in 2016).

NEW EPIDEMIOLOGICAL DATA

These observations for 2017 may be placed in perspective with the new epidemiological data available. Although the 2016 Health Barometer survey carried out by Santé publique France concluded that tobacco smoking among adults remained stable compared to 2014 (29% of daily smokers), the results of the 2017 ESCAPAD survey highlighted a clear decline in tobacco use among 17-year-olds. Six out of ten adolescents in this age group have tried tobacco, compared to nearly 7 out of 10 in 2014, and a quarter smoke every day compared to a third three years previously. Although these figures are still high in view of the prevalence rates observed in other Western countries, these are the lowest levels recorded since 2000, which is particularly remarkable since this decline follows a spike in use between 2008 and 2014.

Spotlight on electronic cigarettes

At the end of 2017, the number of specialist stores in France reached 2,614, i.e. approximately 5% more compared to 2016 (source: PGVG magazine). Following its exponential growth between 2012 and 2014, the e-cigarette market has thus appeared to stabilise since 2015, although it is still difficult to monitor all sales in this sector, which include online purchases.

In 2016, 3.3% of French people aged 15 to 75 years used electronic cigarettes[3], 2.5% on a daily basis. These proportions have fallen compared to 2014 (5.9% and 2.9%, respectively). Three quarters of vapers are daily users (compared to half in 2014) and 41.2% are former smokers (compared to 23.1% three years previously).

Among 17-year-olds, in 2017, 52.4% claimed to have already used an e-cigarette at some point in their lives, hence, only slightly lower than in 2014 (53.3%). However, electronic cigarette use has mainly remained occasional: 34.9% of lifetime users tried it only once, and last-month vaping concerns fewer adolescents compared to 2014 (16.8% *versus* 22.1%). Daily vaping is very rare: this concerns barely 2% of 17-year-olds in 2017.

3. 2016 Health Barometer survey conducted by *Santé publique France* for adults, and 2017 ESCAPAD conducted by the OFDT for 17-year-olds.

CONCLUSION

2017 was characterised by a very powerful symbolic measure, even though its primary goal did not aim to have an immediate and direct impact on sales: plain packaging. However, the downward trend in official tobacco sales observed in 2016 has been confirmed in 2017, although it appears limited given the two price increases in February and November. The latter nonetheless prompted a striking development: the marked decline in roll-your-own tobacco, which had been largely growing over the past fifteen years, owing to its lower price.

As in 2016, all indicators relating to tobacco cessation point to an improvement, with sales of tobacco cessation treatments reaching a record level, due to higher National Health Insurance Fund reimbursement rates. Furthermore, the Tobacco Information Service telephone helpline/website is attracting ever more users, as part of the growing appeal surrounding the second year of the #MoisSansTabac campaign.

As regards the prevalence of tobacco use, the changes observed among 17-year-olds clearly confirm the trends observed among French high school students in 2015 (ESPAD survey). These changes more than likely stem from legislative and social changes in progress over the past decade (ban on sales to minors and on smoking in public places, plain packaging, etc.). As shown by a recent qualitative study, the image of tobacco among younger generations appears to have declined considerably compared to their elders.

While tobacco smoking has remained stable, at a high level, for the overall population since 2010, it is possible that lower use among young people and the rise in indicators relating to cessation could be precursors of generally declining use, prompted by the one-euro price increase in March 2018 and the prospects of the 10-euro pack in 2020.

French Monitoring Centre for Drugs and Drug Addiction

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www.ofdt.fr

3, avenue du Stade de France
93218 Saint Denis La Plaine Cedex
France
Tel. : + 33 (0)1 41 62 77 16
ofdt@ofdt.fr

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