



## **Full Length Research Article**

### **ANTI-SMOKING CAMPAIGN – DECREASING OR INCREASING TREND IN CIGARETTE CONSUMPTION IN THE REPUBLIC OF MACEDONIA AND THE REGION**

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#### **ABSTRACT**

Initial production and use of tobacco in manufacture of cigarettes and other tobacco products for the needs of smokers has moved from rejection to privilegization, to eventually end as mass production worldwide. Cigarettesmoking is accepted by all social classes, both by men and women, and does not recognize any religious limitations. Smoking starts at very young ages. Some twenty years ago the age of smokers was 16, and now, despite the powerful anti-smoking propaganda, it fell to 14, and even 12 year-old smokers. Today, cigarette the production is performed with the most sophisticated technology, using science and scientific achievements, to maximally reduce the harmful effects of tobacco smoke on human health.

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#### **INTRODUCTION**

Massive anti-smoking campaign has been running worldwide for 50 years to increase the knowledge on the harmful effects of smoking on human health. The campaign was amplified in 2003, with adoption of the Framework Convention on Tobacco Control, which was accepted, signed, ratified and implemented in the legislation of over 180 countries, including the Republic of Macedonia. So far there are no particular data on how the Convention and adopted laws affect the situation and trends in the production and consumption of cigarettes.

##### **Tobacco production in the Republic of Macedonia**

R. Macedonia is widely known for its tobacco leaf production (25,000 - 30,000 t per year), but it is also known for its production of cigarettes. There is a tendency of constant decline in production of cigarettes in the transitional period (1991 to date). According to data from "Tobacco Journal International" (2004), the production of cigarettes in the country, which had reached even 11,000 t, constantly declined to 5513t in 2014.

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Production of cigarettes in R. Macedonia is accomplished by the multinational company "Imperial Tobacco" and the state-owned company "TutunskiKombinat" AD – Prilep ("Tobacco Company" – Prilep). The production realized in these two companies in the period 2011 - 2014 was as follows:

The above table reveals that 85-90% of the cigarette production is realized by "Imperial Tobacco" and the rest by "Tutunskikombinat" AD - Prilep. This production represents the supply of cigarettes on Macedonian market, which is complemented by cigarette imports. According to the available data, the total supply of cigarettes on Macedonian market is as follows:

In addition to the overall supply of cigarettes, it is necessary determine the total demand-consumption of cigarettes in R. Macedonia.

##### **Consumption of cigarettes in Macedonia**

Cigarette consumption on the market is based on the total supply of cigarettes minus cigarette exports. Cigarette consumption in the period 2011 - 2014 was as follows:

Data on the total cigarette consumption show constant increase of about 1.000 tons of cigarettes for the period 2011-2014.

**Table 1. Cigarette production in R. Macedonia**

Year	Amounts (in tons)
2011	7.615
2012	6.481
2013	6.507
2014	5.513

Source: Tobacco Growers' Association of R. Macedonia

**Table 2. Total cigarette supply on Macedonian market**

Year	2011	2012	2013	2014
Cigarette production in R. Macedonia	7.615	6.481	6.507	5.513
Cigarette imports in R. Macedonia.	980	1.268	1.398	1.724
Black market (in %)	No data			
Total supply	8.595	7.749	7.905	7.237

Source: Economic Chamber of R. Macedonia, 2014

**Table 3. Cigarette consumption in R. Macedonia (in tons)**

Year	2011	2012	2013	2014
Total supply of cigarettes	8.595	7.749	7.905	7.237
Cigarette exports	4.431	3.057	3.032	2.160
Total consumption	4.164	4.692	4.873	5.077

Source: Economic Chamber of R. Macedonia, 2014

Based on the author's analysis, cigarette consumption in R. Macedonia in 1989 (period of transition) reached 4,500 tons, i.e. the actual consumption in 25 years increased by 500 tons. The average structure of cigarette production in the period 2011 - 2014 of "Imperial Tobacco" and "Tutunskikombinat" AD - Prilep is as follows:

**Table 4. Cigarette production in R. Macedonia by producers (in tons)**

Year	R. Macedonia	"Imperial Tobacco"	"Tutunskikombinat" AD - Prilep
2011	7.615	6.964	669
2012	6.481	5.518	962
2013	6.507	5.576	931
2014	5.513	5.080	433
процек:	6.529	5.780	749

Source: Economic Chamber of R. Macedonia, 2015 (State Statistical Office)

The production of cigarettes in R. Macedonia has a general tendency of declining and the most significant decline can be seen in "Tutunskikombinat" AD - Prilep. Market orientation of this production (domestic/foreign market) is presented in Table 5:

**Table 5. Market orientation of cigarette production (in tons)**

Year	"Imperial Tobacco"	Exports	%	"Tut. Kom." AD - Prilep	Exports	%
2011	6.964	4.388	63	669	43	6
2012	5.518	2.982	54	962	275	28
2013	5.576	2.942	52	931	282	31
2014	5.080	2.074	41	433	86	19
процек:	5.780	3.096	53	749	173	22

Source: Authors' analyses

Data presented in Table 5 show that 50% of the cigarette production is intended for exports. From the rest of 6573 tons (2011-2014), 3.229 tons are exported and 3.304 tons remain in the domestic market.

According to the data presented in Table 3, the average cigarette consumption in R. Macedonia is 4,700 tons, out of which 3.304 tons are obtained from domestic market and 1,400 tons must be supplied from imports, in order to satisfy the needs of the domestic market. Beside the two manufacturers - "Imperial Tobacco" and "Tutunskikombinat" AD - Prilep, there is another commercial company on the cigarette market in R. Macedonia - "Philip Morris - TutunskiKombinat" LLC - Skopje, a newly established company which actively began to sell cigarettes from a range of brands produced by "Philip Morris" and "Tutunskikombinat" AD - Prilep in 2015. It remains to see what will be the results of this heavy competition on a small cigarette market.

Other multinational companies present with their cigarette brands on Macedonian market are "BAT" (British American Tobacco) and "JTI" (Japan Tobacco International), as well as the "Fabrika Duvana" Rovinj - cigarette factory from Croatia, which was sold to "BAT" in 2015 for 500 million euros. A very severe competition is concentrated on a market of only 4500-5000 tons of cigarettes, mainly from leading multinational companies. Four of these companies are already located in the area of former Yugoslavia: "Philip Morris" in Nis - Serbia, "BAT" in Vranje - Serbia and Rovinj - Croatia, "Imperial Tobacco" in Skopje - Macedonia and "JTI" in Senta-Vojvodina. Even the former Yugoslav market with cca 25,000 tons of cigarettes is small for these large multinational companies. It is assumed that this market will be a subject of globalization in near future. The production and consumption of cigarettes and their trends in R. Macedonia seem to anticipate such development. From the analyses on cigarette consumption in R. Macedonia we shall present presumptive data on the total consumption and consumption per capita. On the "World Smoke free Day" the media conveyed information that Macedonia consumed 11 tons of cigarettes, with 5.5 kg. cigarettes per capita. The amount of 11 tons of is only 2.3% of the actual consumption of 4,700 tons, while the figure of 5.5 kg per capita is more than twice the official figure of the Institute of metrics and health evaluation from the US for 2014, which reported that the consumption per capita in Macedonia was 2.3 kg.

#### Movement of cigarette consumption per capita in Macedonia and former federal units of SFRY ugoslavia

Presented data on the production and consumption of cigarettes in Macedonia (total and per capita) will be compared to the situation in the pre-transitional period (1989).

**Table 6. Total consumption of cigarettes per capita in the republics of former Yugoslavia in 1989 (tons)**

Republic	Total consumption	Consumption per capita (kg)
Bosnia and Herzegovina	7.512	1,662
Montenegro	1.011	1,599
Croatia	11.156	2,384
Macedonia	4.465	2,137
Slovenia	3.361	2,256
Serbia	22.154	2,502

Source: Statistical Yearbook of Yugoslavia -1990

25 years after, according to the data of the Institute of Metrics and Health Evaluation (USA) in 2014, the cigarette consumption per capita in the above republics is as follows:

**Table 7. Consumption of cigarettes per capita (in tons)**

Republic	Consumption per capita (kg)
Bosnia and Herzegovina	2,310
Montenegro	/
Croatia	1,662
Macedonia	2,310
Slovenia	2,369
Serbia	2,861

Source: Dr. LjubenPoposki "The rise and fall of Tobacco Company-Prilep", 2014

Percentages of current smokers in the population of some republics of former Yugoslavia and Albania in 2014 are presented in Table 8.

**Table 8. Percentage of smokers in the total population (%)**

Macedonia	37
Bosnia and Herzegovina	32
Croatia	31
Serbia and Montenegro	27
Albania	21

Source: Economic Chamber of Macedonia, 2014

### Is the antismoking campaign losing its intensity?

The situation with the production and sale of cigarettes in the small Macedonian market gives certain signals concerning the effectiveness of the measures to reduce and restrict smoking that have been implemented by the WHO for more than 50 years. Law on Tobacco Control of the Republic Macedonia was adopted in 1995 and to date it has been under continuous development, implementing all possible regulations of the Framework Convention concerning the prohibition of advertising, a ban on sponsorship of sports and cultural events, written warnings on cigarette packs and morbid graphics to scare smokers. In that context, the Macedonian Ministry of Health is one of the most persistent in implementing the Framework Convention.

However, the situation on the real market seems to deny the anti-smoking lobbies. Smoking is not only reduced but shows a tendency of increasing. In everyday practice the law on restriction of smoking is implemented without obstacles, which leads us to a conclusion that the culture of smoking is at high level or it is only apparent.

The question is whether a universal convention could be imposed to all countries in the world and is it possible to regulate this global and legal branch of industry?! Does the Framework Convention respect the diversity and specificity in terms of social, economic, religious and cultural practices, especially in times of permanent crises of a different nature, such as wars, natural disasters, industrial and environmental crises. It is necessary to develop a common approach of the anti-smoking lobby and the representatives of tobacco industry, whose opinion has not been respected so far. Only the cooperation between the WHO and the real sector could lead to a real solution.

### Conclusion

Production of cigarettes in the Republic Macedonia has a tendency of constant decrease. In the period 2011 - 2014 this production has been reduced by 2,000 tons of cigarettes. The biggest decline occurs in the cigarette factory of "TutunskiKombinat" AD-Prilep ("Tobacco Company" - Prilep). Supply of cigarettes at the Macedonian market in 2014 was 7237 tons, provided by the "Imperial Tobacco" - Skopje and "Tutunskikombinat" AD-Prilep and supported with imports of cigarettes. Cigarette consumption in Macedonian market in 2014 was 5,077 tons, while the average consumption in the period 2011- 2014 amounted to 4,700 tons. Regarding the structure of cigarette consumption, 3.304 tons are of domestic production and 1,400 tons are cigarettes from imports, making an average of 4,700 tons.

Exports of cigarettes in this period was also in constant decline. Compared to 2011, the exports of cigarettes from Macedonia dropped by 50%. Cigarette consumption per capita for the period of 25 years increased from 2,137 to 2,310 cigarettes per year, which is an average annual increase of 0.4%. The estimate of per capita consumption is based on the 2002 census, when the number of registered inhabitants was 2,022,000.

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