The market for bidis and smokeless tobacco in India: Evidence from towns in five states

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Background

- Bidis (hand-rolled cigarettes) and smokeless tobacco (SLT) account for 81% of tobacco consumption in India.
- Almost 200 million Indians use SLT products and over 70 million use bidis.
- Bidis and SLT are particularly popular outside of urban areas and among poorer, less educated consumers.
- **Objective:** To examines the brand variability, price, and presence of an Indian health warning label (HWL) for bidi and SLT packs in semi-urban and rural towns.
Methods

• From October 26 to November 23, 2017, bidis and SLT products were collected in five states (see map)

• Across the five states, we collected
  1. 71 state-unique bidi
  2. 240 state-unique SLT packages

• State-unique cigarette packs (n=71) collected in the same area are used as a reference group in this study
Brand Variability

The bidi collection had a greater percent of unique brands, while SLT products had a greater number of unique brands:

- **Bidis**: 55 unique brands accounted for the 71 bidi packs; three brands (5%) were found in multiple states
- **Smokeless tobacco**: 97 unique brands found in the 240 SLT products; 19 brands (20%) were found in multiple states

![Graph showing brand variability between cigarettes, SLT, and bidis]
Price and Health Warning Label

<table>
<thead>
<tr>
<th>Tobacco Product</th>
<th>Median Price (₹)</th>
<th>Range (₹)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bidis</td>
<td>12</td>
<td>5-25</td>
</tr>
<tr>
<td>SLT</td>
<td>5</td>
<td>1-300</td>
</tr>
<tr>
<td>Cigarettes</td>
<td>95</td>
<td>5-300</td>
</tr>
</tbody>
</table>

Note: During data collection ₹65 was worth about 1 USD

- Bidis median price per stick: ₹0.65 ($0.01)
- Chewing tobacco (N=78) median price per gram: ₹0.65 ($0.01)
- Cigarettes median price per stick: ₹9.1 ($0.14)

- Cigarettes had the highest proportion of packs without an Indian HWL (10%) and highest with a current HWL (79%)
- Bidis had the highest proportion of packs with old HWL (55%) and lowest with a current HWL (45%)
Conclusion

• The price and brand distribution across states of SLT products looked similar to cigarettes

• The observed pricing and brand variability of bidis provides the appearance of many small producers

• Very few bidi and SLT products were found without an Indian HWL (regardless of being current (April, 2017 implementation) or compliant)
  • This may be indicative of localized production and distribution

Keys Moving Forward:
• Treat the bidi and SLT industries similar to the tobacco industry involved with cigarettes
  • Remove special treatment for “small” businesses for all tobacco products
• Consider standard packaging for bidis and SLT that can address HWL issues and have an impact on affordability
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Thank you!
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