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Economic Policy Research Foundation of Turkey

The Economics of Preventing and Quitting Tobacco Use in Turkey

Supply, demand, health, and public policy
aspects

21 October 2021

Framework

Aim of this webinar

By observing public health policies,

- To contribute to the design of effective policies to keep people away from tobacco use and help people who are already addicted to quit smoking
- To examine the **development and current situation of tobacco use** in the world and in Turkey,
- *Alongside the health concerns* in the development of policies that will be effective in controlling tobacco use, **to scrutinize the supply, demand, and public policies of stakeholders such as producers, users, and the public, which affect tobacco use,**
- **To discuss what kind of research is needed** with the aim of **creating more effective policies** based on the findings of the situation analysis

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**The Economics of Preventing and Quitting
Tobacco Use in Turkey**

Supply, demand, health, and public policy aspects

**Tobacco use directly threatens
public health**

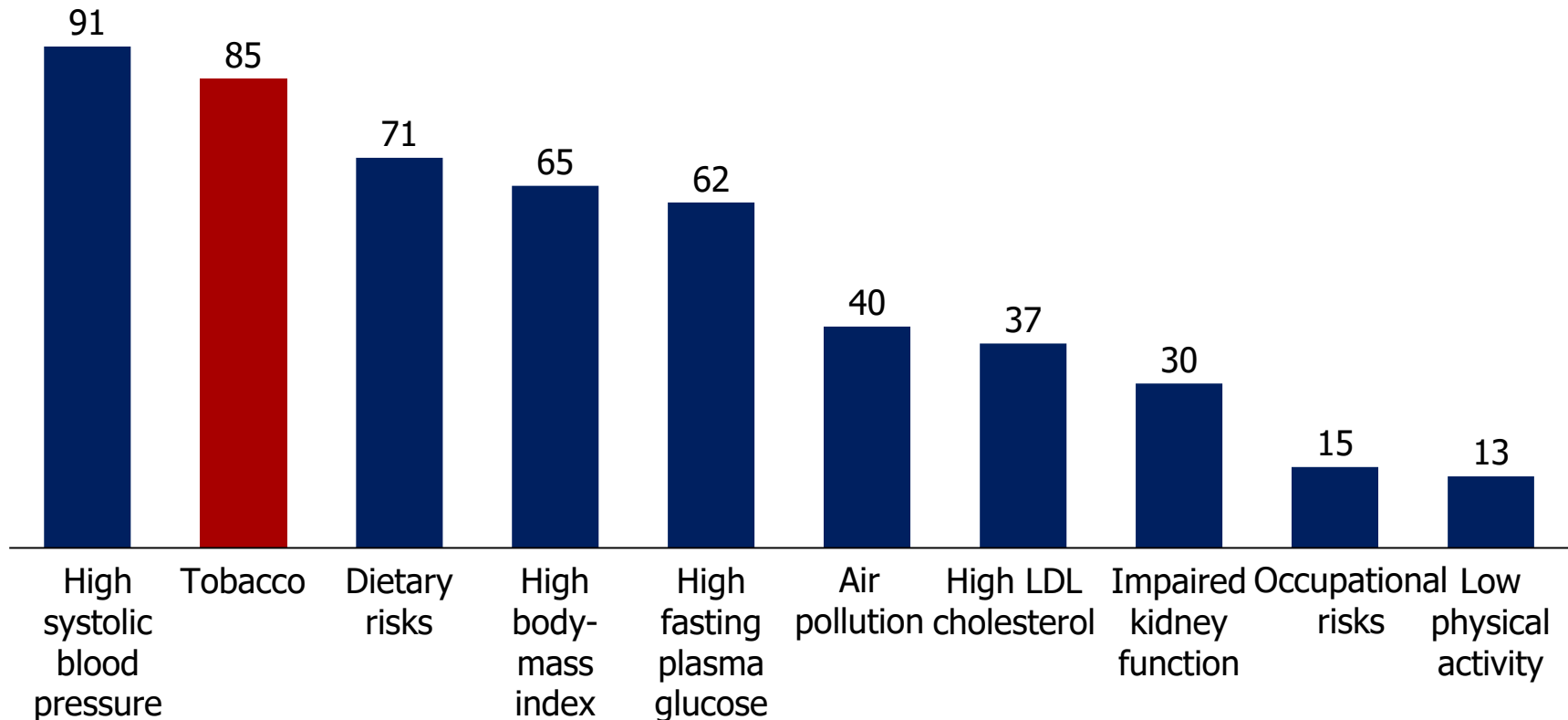
Tobacco use (direct and passive smoking) is harmful to human health

- One of the most important risk factors causing death,
- One of the leading causes of preventable deaths,
- Diseases associated with the use of tobacco;
 - Chronic respiratory diseases
 - Neoplasms
 - Cardiovascular diseases
 - Respiratory tract infections,
 - Tuberculosis and neurological disorders

Turkey is the 16th country in the world with the highest death rate due to tobacco use

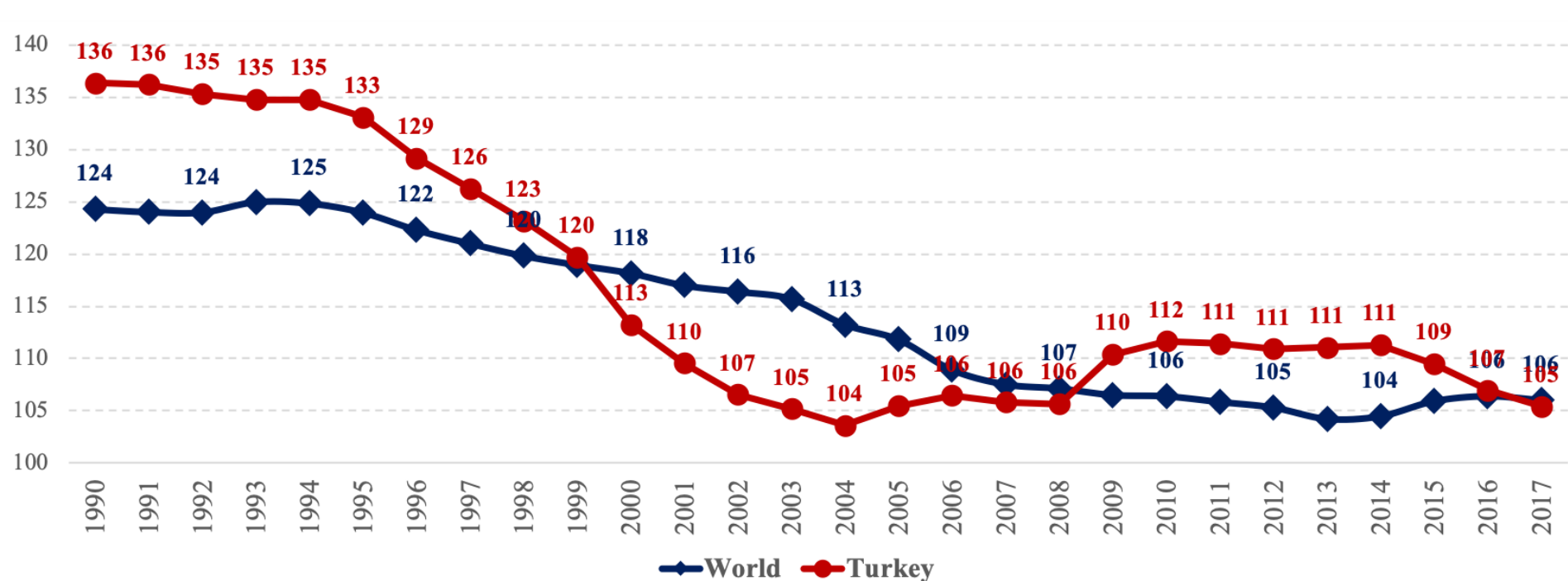
The number of deaths due to tobacco use alone reached 85,000 in 2017

Number of estimated deaths attributable to each risk factor in Turkey, top 10 factors, thousand, 2017



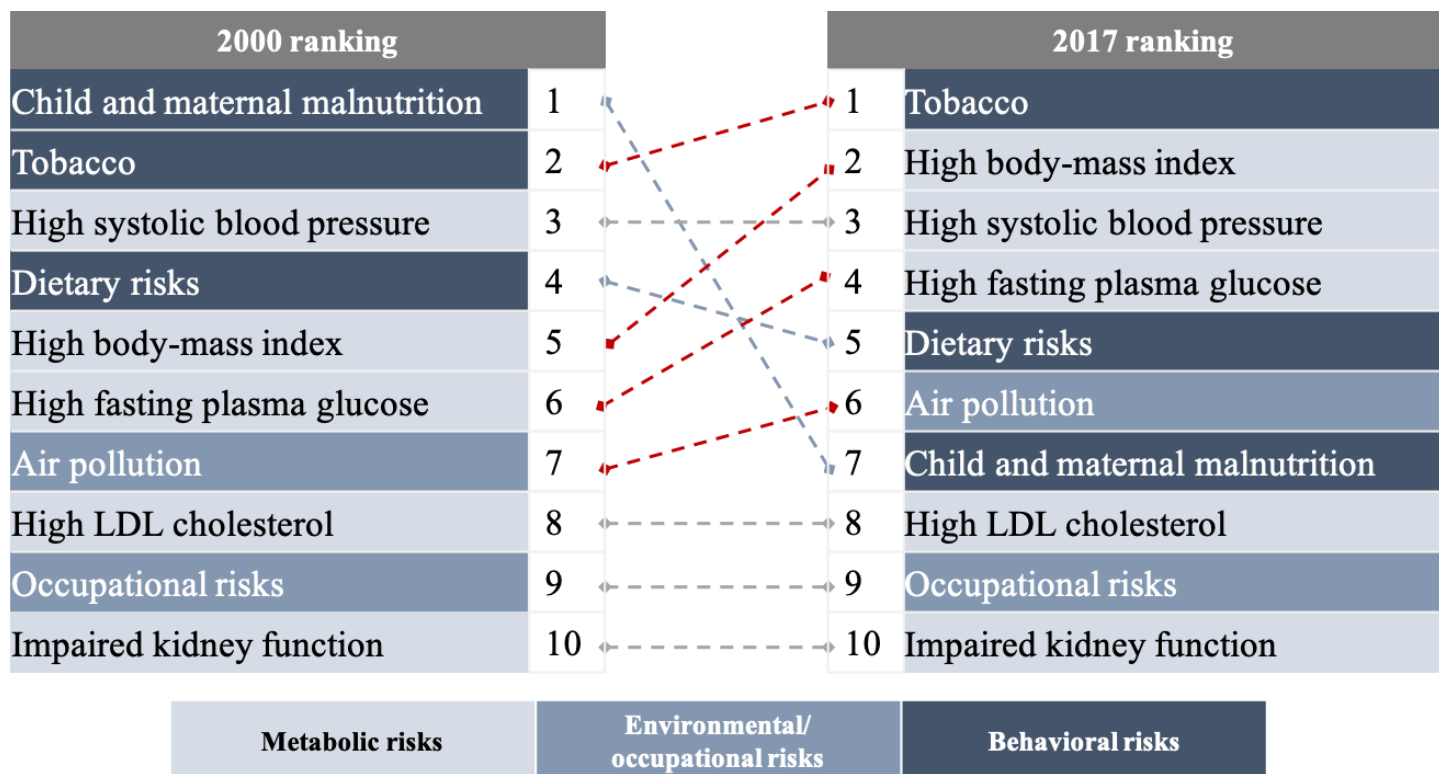
Between 1990-2019, 2.5 million deaths in Turkey were associated with tobacco use

Number of estimated deaths attributable to tobacco use in Turkey and the world, per 100,000 people, 1990-2017



Tobacco use is the main risk factor most associated with death and disability in Turkey

Estimates for the top 10 risk factors that lead to the highest number of deaths and disability according to DALY metric in Turkey, 2000 and 2017



Source: Institute for Health Metrics and Evaluation (IHME), “Global Burden of Disease (GBD) Study 2017”, TEPAV calculations

Note: The Years of Life Lost (YLL) is a metric that takes into account the years of life lost due to premature mortality and loss of health to fully assess the economic burden of diseases.

The health burden of tobacco was quite high in the 2002-2017 period, although it did not change

- Tobacco use (active and passive) accounted for approximately 20 percent of Years of Life Lost (YLL)
- Its share in Years of Health Life Lost Due to Disability (YLD) was about 6 percent
- Its share in Disability-Adjusted Life Year (DALY) was approximately 13 percent

It is estimated that the number of premature deaths from tobacco will exceed 127,000 annually by 2050*

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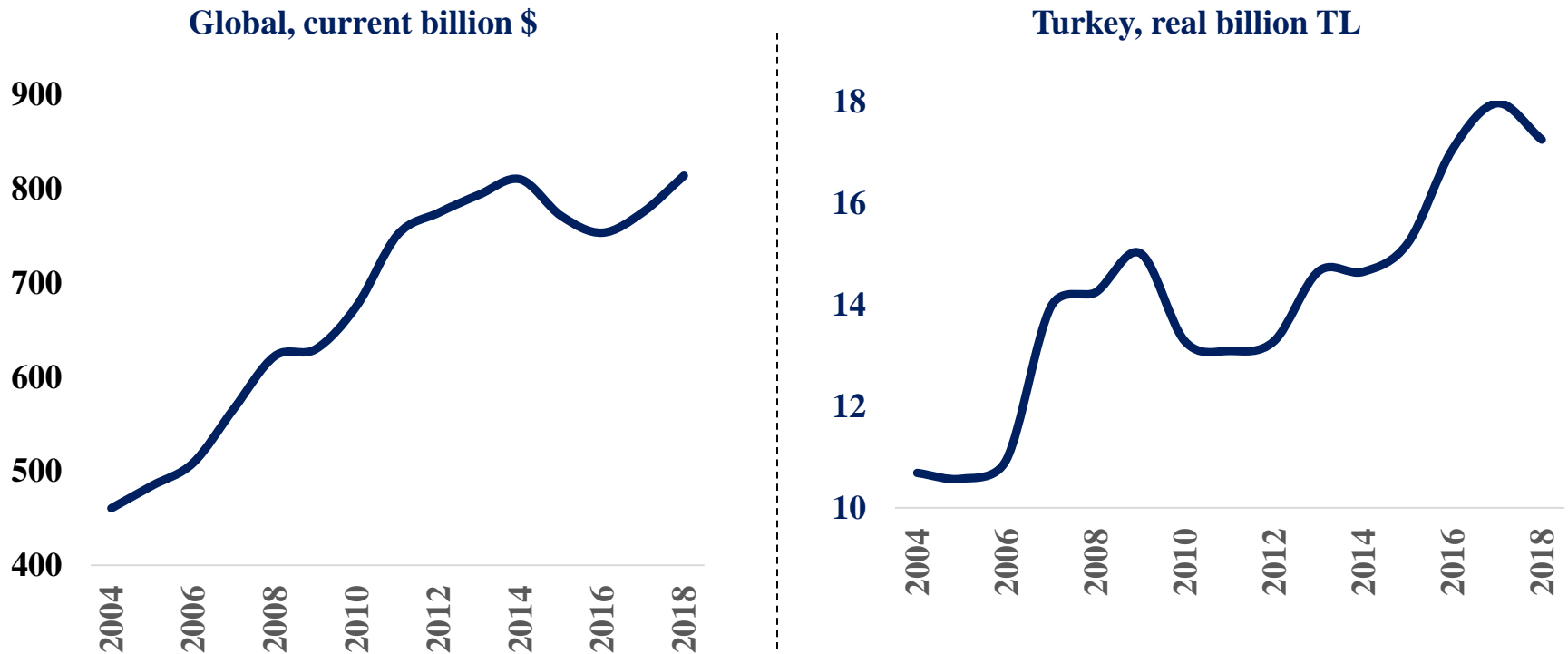
**The Economics of Preventing and Quitting
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Supply, demand, health, and public policy aspects

Tobacco Industry in the World and in Turkey

Tobacco industry continues to grow worldwide and in Turkey

Retail sales volume of the tobacco industry in the world, total and per capita, RSP, 2004-2018

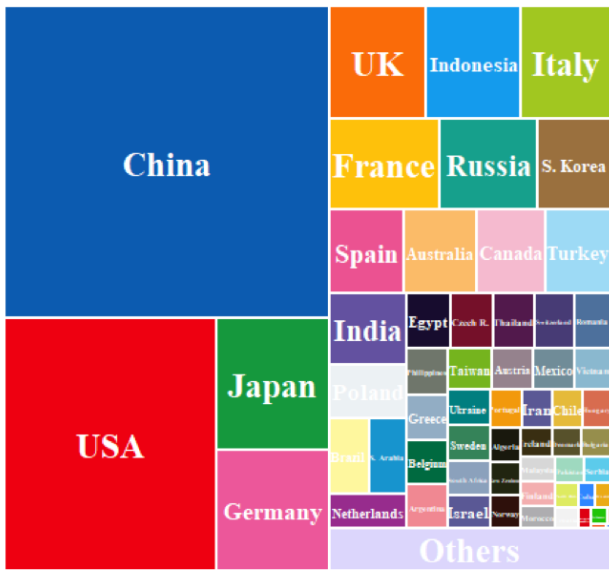


Only 15 out of 189 countries buy 79 percent of tobacco and tobacco alternative products

Turkey is among the top 15 countries

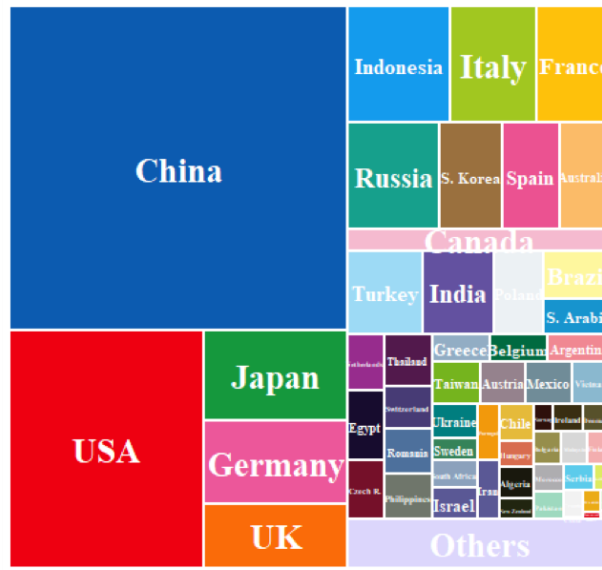
Breakdown of retail sales of conventional tobacco products and alternatives by countries, RSP, 2018

Total



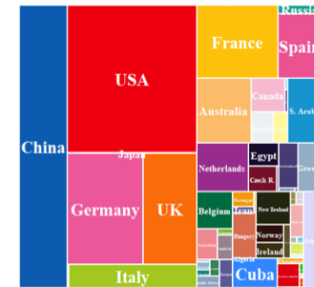
814 billion \$

Cigarettes



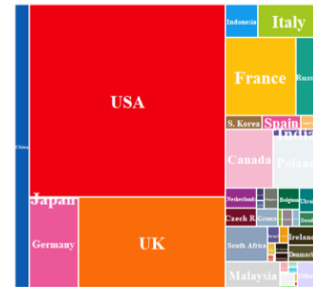
714 billion \$

Other smoked tobacco products



60 billion \$

E-cigarettes



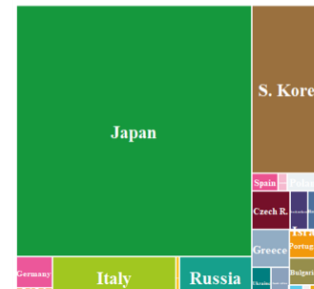
16 billion \$

Smokeless tobacco products



13 billion \$

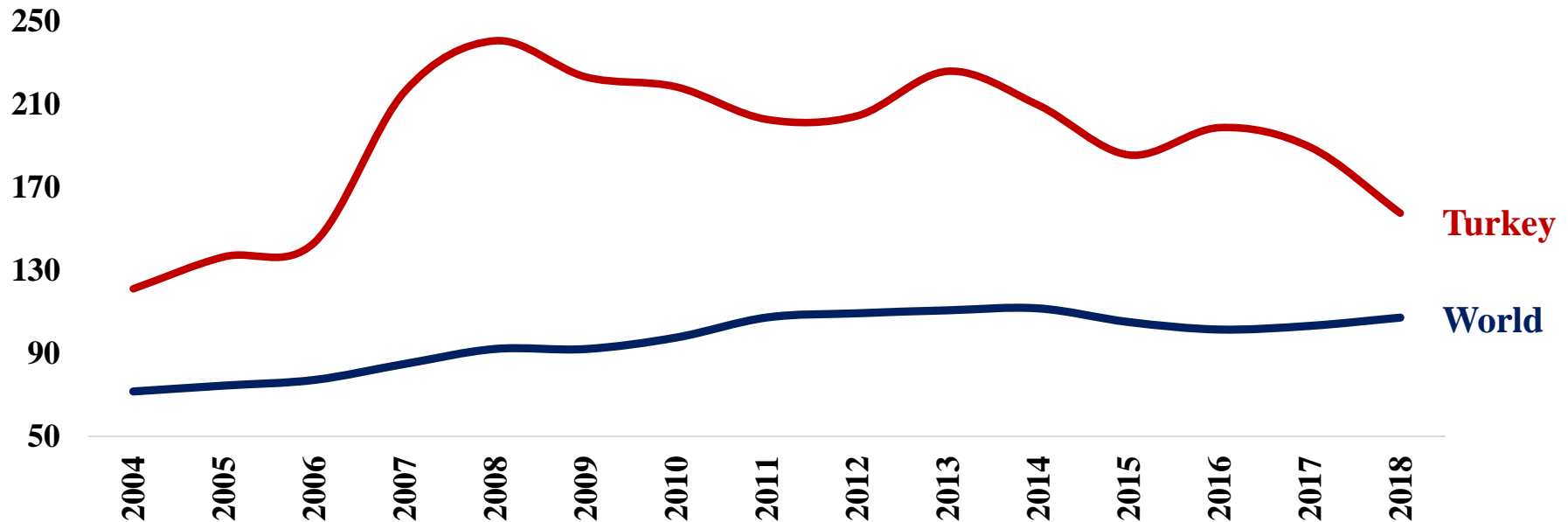
Heated tobacco



12 billion \$

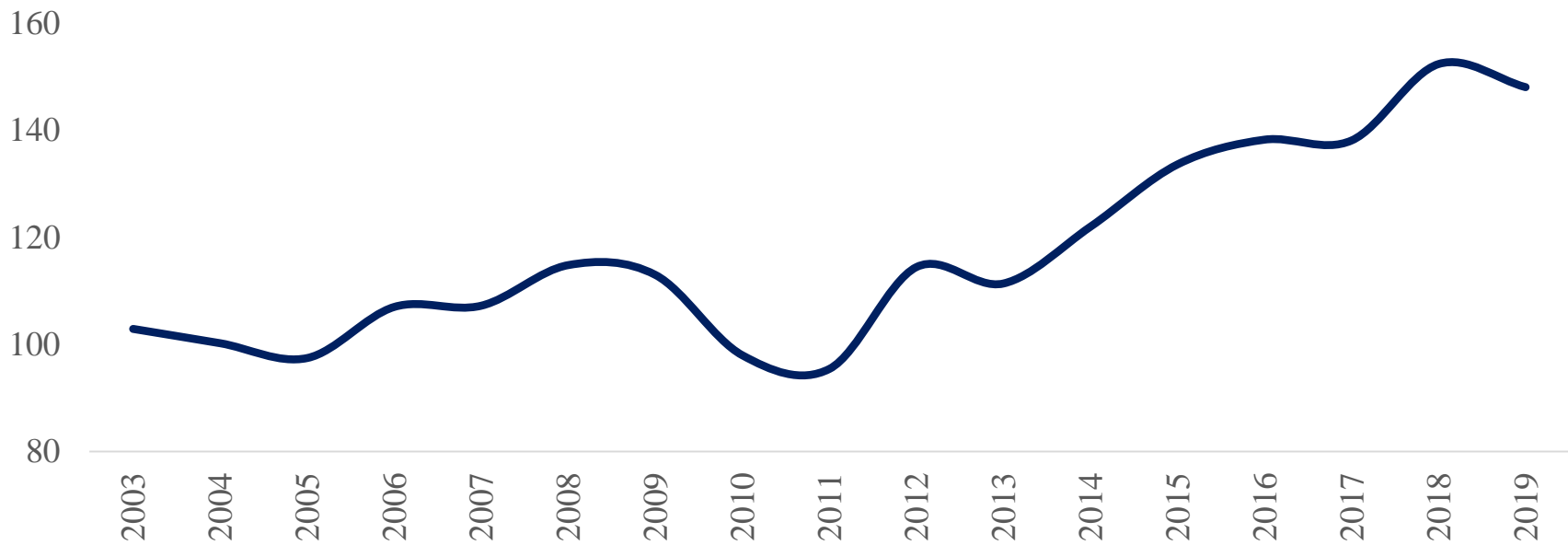
Retail sales per capita in Turkey is much higher than the world average

Comparison of per capita retail sales volume of the tobacco industry in Turkey and the world, RSP, \$, 2004-2018



Production of tobacco products in Turkey has reached 148 thousand tons from 103 thousand tons during the 2003-2019 period

Total production of tobacco products in Turkey, thousand tons, 2003-2019



Source: T.C. Tarım ve Orman Bakanlığı Tütün ve Alkol Dairesi Başkanlığı , TEPAV calculations

Note: It was assumed that 1 cigarette stick consists of 0.85 grams of tobacco. Tobacco products is defined to include cigarettes, waterpipe tobacco, pipe tobacco, cigars/cigarillos, and cut rag for hand-rolling.

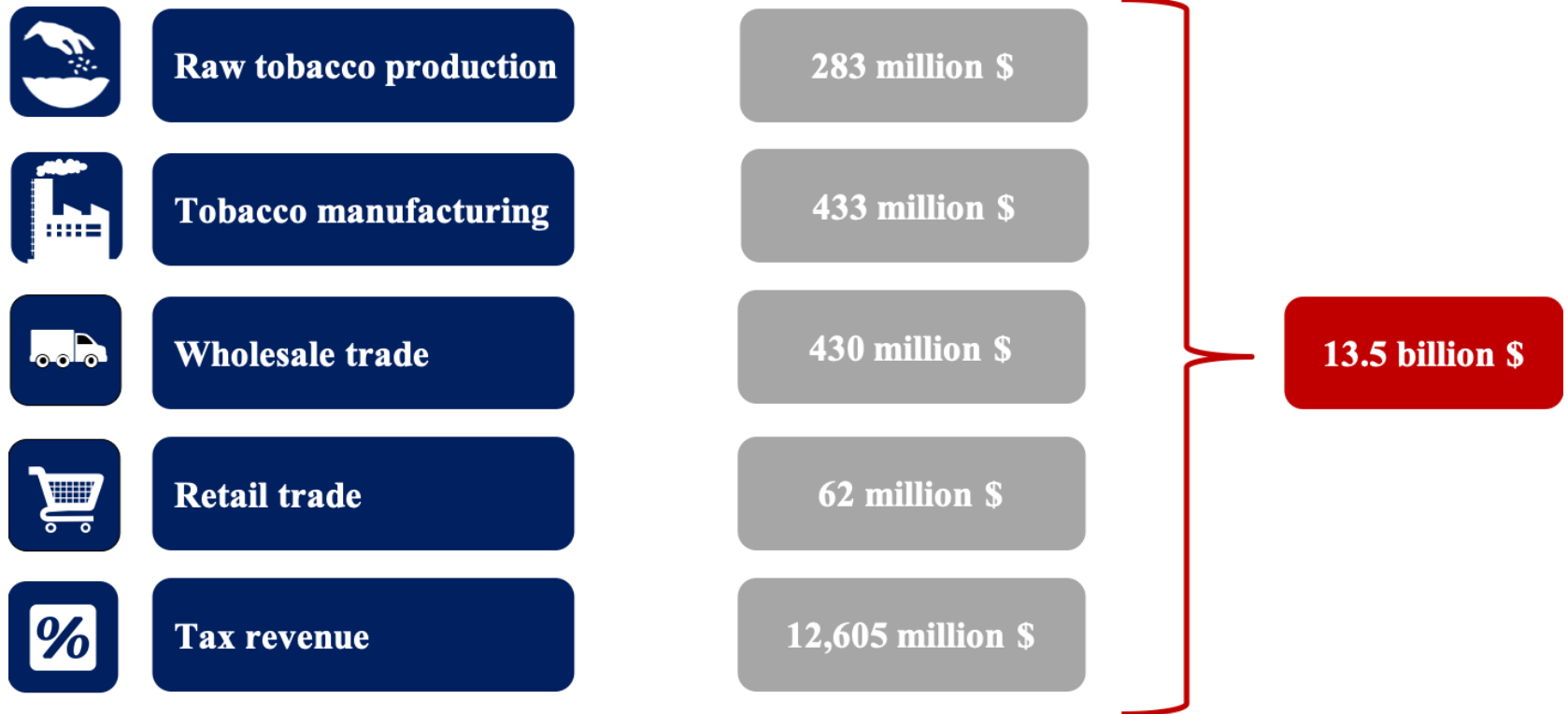
While the total tobacco products production volume in Turkey continued to increase between 2003-2019...

- **The area of land devoted to tobacco farming has gradually decreased**
- **The use of imported tobacco** in the production of tobacco products in Turkey has become increasingly widespread
 - ➔ The share of domestically grown tobacco in domestic cigarette production decreased from 42 percent to 12 percent
- The production of tobacco products by foreign companies in Turkey has increased with **foreign direct investment inflows**
 - ➔ It is estimated that at least \$300 million of the \$9.2 billion FDI inflow in the food, beverage, and tobacco sector is for the manufacture of tobacco products
- **The total production volume of tobacco products in Turkey has increased and diversified with the increase in the share of different product groups**

The economic value generated in tobacco and its products value chain in Turkey amounts to 13.5 billion dollars (2017)

Taxes constitute the biggest link of the chain with a share of 93 percent

Economic value generated in the value chain of tobacco products in Turkey, 2017



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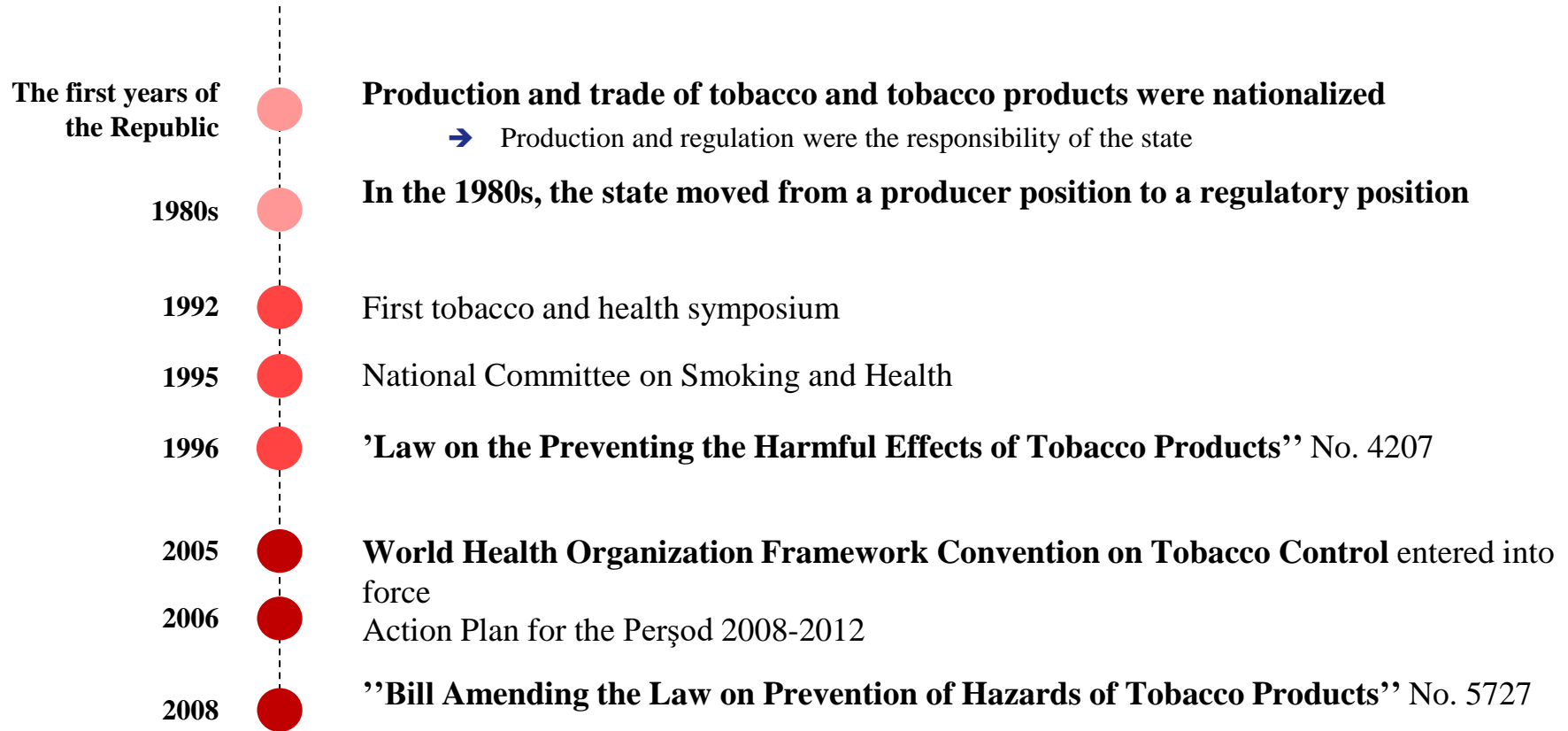
**The Economics of Preventing and Quitting
Tobacco Use in Turkey**

Supply, demand, health, and public policy aspects

Tobacco control policies in Turkey

The health dimension of the use of tobacco and tobacco products began to come to the fore in Turkey in the 1990s

The measures taken in the 2000s were strengthened



Turkey is one of the two countries and the first country to fulfill all MPOWER measures at the highest level

Measures	
M onitor	Monitoring tobacco use and protection policies
P rotect	Protecting people from tobacco smoke
O ffer	Offering help/support to those who want to quite smoking
W arn	Warning the public about the harms of tobacco
E nforce	Prohibition of Tobacco Advertisement, Promotion, and Sponsorship
R aise	Raising taxes on tobacco products

Note: MPOWER provides key indicators and metrics to guide countries in controlling different aspects and dimensions of tobacco use.

However, despite strict rules and legal regulations, there is no decrease in the rate of tobacco use in Turkey



In order to evaluate Turkey's tobacco control policies, first of all, **global** and **local** tobacco use habits should be examined

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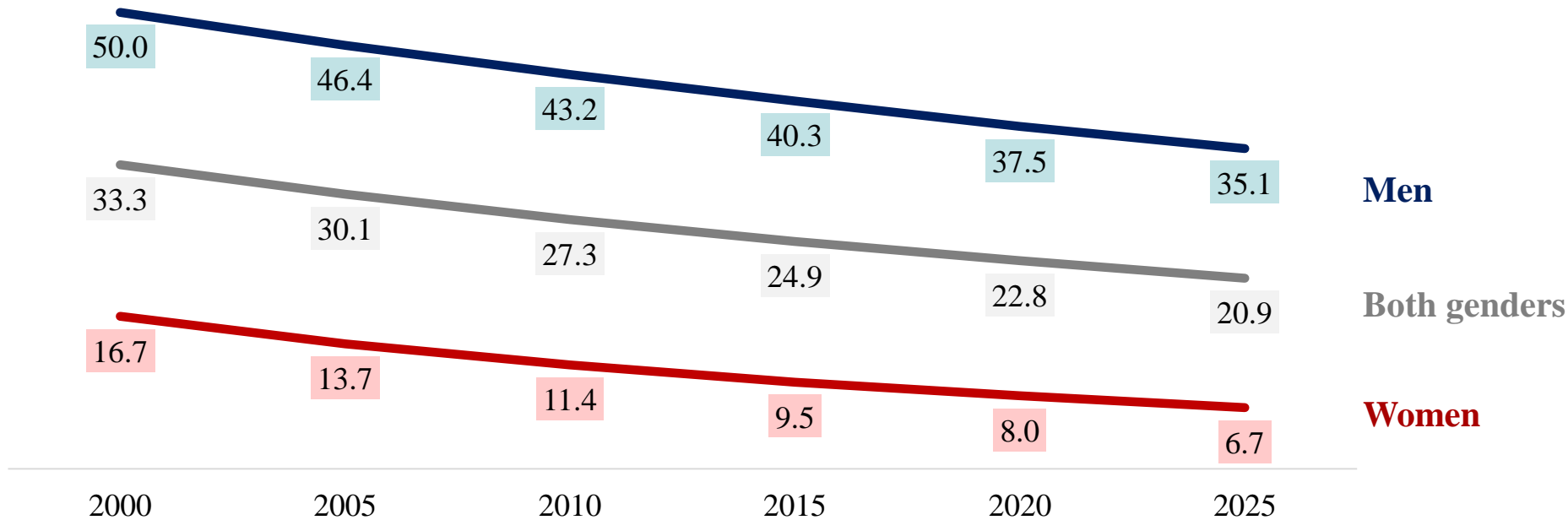
**The Economics of Preventing and Quitting
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Supply, demand, health, and public policy aspects

**Use of tobacco and tobacco
products in the world**

The worldwide tobacco use rate declined from 33.3 percent to 22.8 percent between 2000 and 2020

Global prevalence of tobacco use by gender, +15 population, age standardized, %, 2000-2025



Age group with the highest usage rate in the world, 45-54

Global prevalence of tobacco use by age groups and gender, +15 population, age standardized, %, 2000-2025

	2000	2005	2010	2015	2020	2025
15-24	22.6	20.3	18.6	17.0	15.5	14.2
25-34	31.7	28.9	26.1	23.9	22.0	20.1
35-44	38.6	35.0	32.0	29.2	26.5	24.5
45-54	41.4	37.5	34.0	31.3	28.8	26.3
55-64	39.8	35.5	32.1	29.3	26.8	25.0
65-74	34.4	30.9	27.7	25.0	23.0	21.2
75-84	27.8	24.6	22.3	20.2	18.4	16.8
85 +	19.4	18.3	15.9	14.3	13.0	11.9
Toplam	33.3	30.1	27.3	24.9	22.8	20.9

Higher than the world average

Highest usage rate

Tobacco use is above the world average in South-East Asia, the Western Pacific, and Europe

Tobacco use by women is also above the average, especially in Europe and America

Projected rates of tobacco use by gender and regions, 15+ population, age standardized, %, 2020

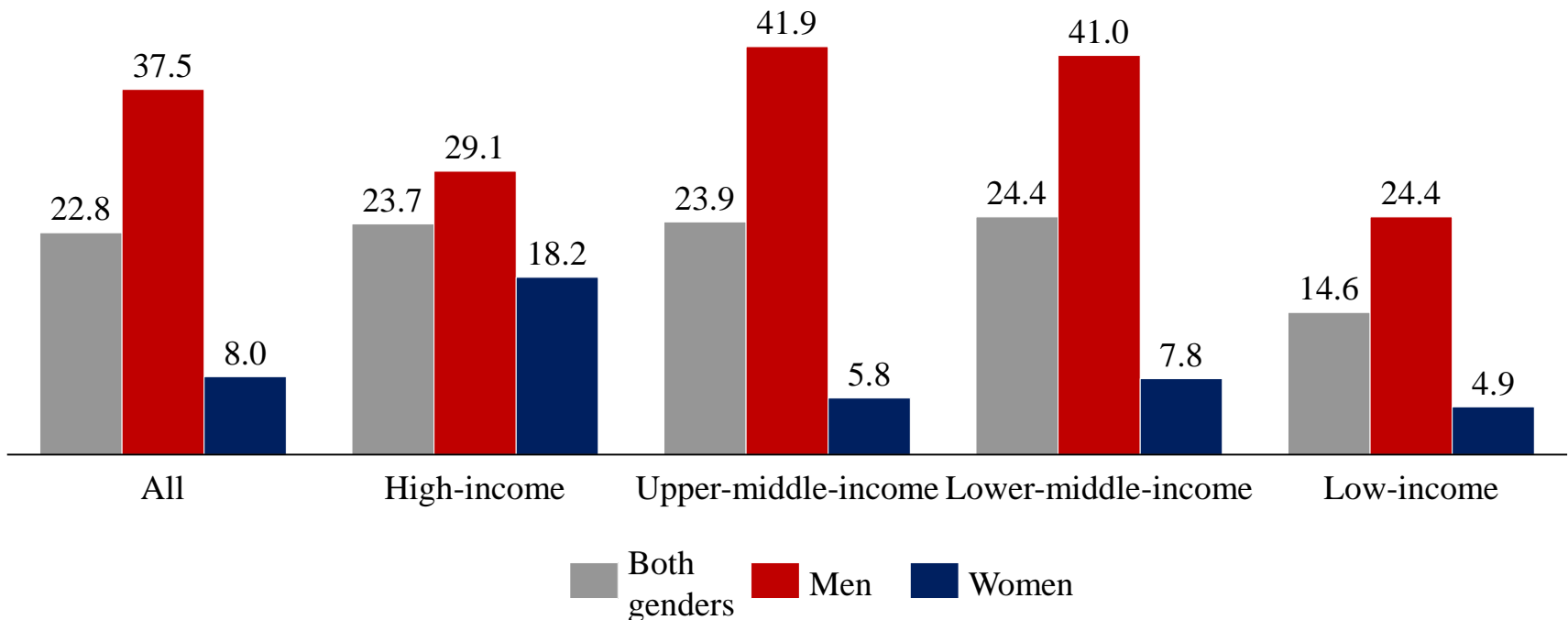
	Both genders	Men	Women	Difference between men and women
All	22.8	37.5	8.0	29.5
South-East Asia	27.9	46.0	9.7	36.3
Western Pacific	25.7	47.9	3.6	44.3
Europe	25.6	32.5	18.7	13.8
Eastern Mediterranean	18.6	33.3	3.9	29.4
Americas	17.5	23.1	12.0	11.1
Africa	12.3	20.7	3.8	16.9

Higher than the world average

Lower than the world average

The rate of tobacco use among women is higher in more economically developed regions

Projected tobacco use rates by income levels and genders, 15+ population, age standardized, %, 2020



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**The Economics of Preventing and Quitting
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Supply, demand, health, and public policy aspects

Use of tobacco and tobacco products in Turkey

Official statistics clearly indicate that there is not a decreasing trend in tobacco use in Turkey

Prevalence of daily tobacco smoking among adults in Turkey according to different data sources, %, 1988-2019

	Literature	GATS	STEPS	THS
1988	43.6*			
1993	33.6* **			
2003	33.8**			
2008		27.4		
2010				25.4
2012		23.8 ↓		23.2 ↓
2014				27.3 ↑
2016		29.6 ↑		26.5 ↓
2017			29.2	
2019				28.0 ↑

Source: CDC, TurkStat, WHO, TEPAV compilations and calculations

Note: After considering the advantages and disadvantages of existing data sources, it was decided to use GATS micro datasets for detailed analysis in this study.

* The quoted source does not specify whether the rate is for daily smokers or for daily and occasional smokers altogether.

** In 1993 and 2003 the statistics are for adults older than 18 years old; in the rest of the years listed in the table the statistics are for adults older than 15 years old.

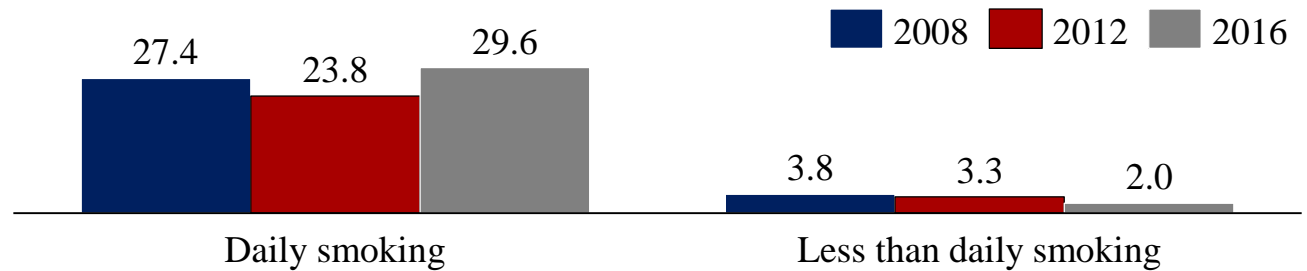
Mexico, Russia, and Ukraine were chosen as benchmark countries to compare with Turkey

Criteria	Explanation					
Data availability at least one year	30 countries micro data available in GATS Argentina, Bangladesh, Brazil, Cameroon, China, Costa Rica, Egypt, Ethiopia, Greece, India, Indonesia, Kazakhstan, Kenya, Malaysia, Mexico, Nigeria, Pakistan, Panama, Philippines, Poland, Qatar, Romania, Russia, Senegal, Thailand, Turkey, Uganda, Ukraine, Uruguay, and Viet Nam					
Data availability at least two years	8 countries with more than two years data India, Mexico, Philippines, Russia, Turkey, Ukraine, Uruguay, Viet Nam <small>(Bangladesh and Brazil latest survey data not available, Thailand latest survey data is for 2011 whereas other countries have data at least for 2015, i.e. Turkey - 2016)</small>					
Parameters considered	Income group similarity to Turkey	Population size similarity to Turkey	Geographic closeness to Turkey	Tobacco smoking prevalence rate similarity to Turkey	Deterioration example in which tobacco smoking has increased over time	Better off example in which tobacco smoking has decreased over time
Short-listed countries	<ul style="list-style-type: none"> Mexico Russia 	<ul style="list-style-type: none"> Mexico Philippines Russia Ukraine Vietnam 	<ul style="list-style-type: none"> Russia Ukraine 	<ul style="list-style-type: none"> Russia 	<ul style="list-style-type: none"> Mexico 	<ul style="list-style-type: none"> India Philippines Russia Ukraine Uruguay Vietnam

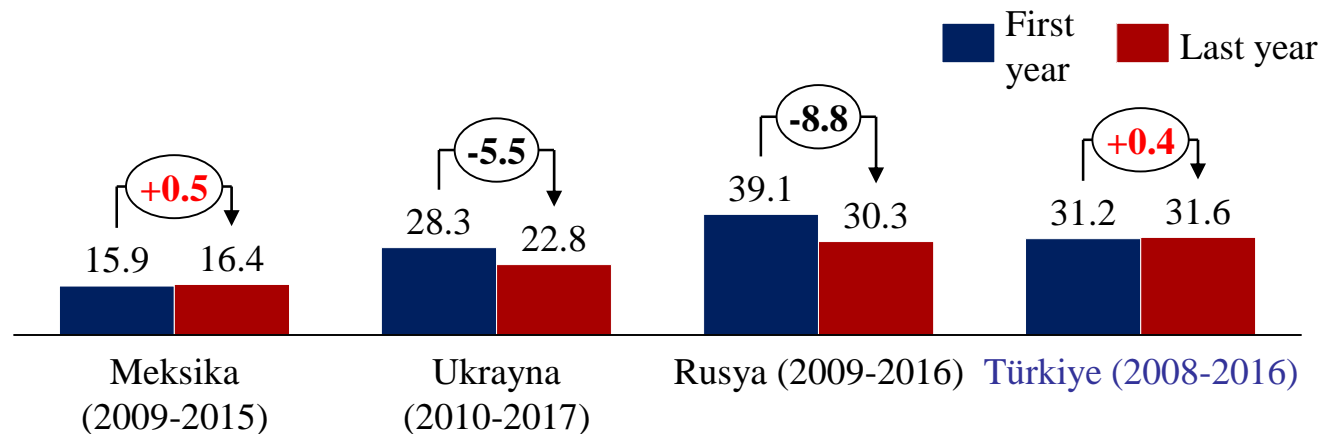
Mexico, Russia, and Ukraine: at least three times across 6 motivation criteria

In 2016, 31.6 percent (19.2 million) of individuals aged 15 and over in Turkey were tobacco users

Patterns of tobacco smoking, 15+ population, Turkey, %, 2008-2012-2016



Prevalence of tobacco smoking in benchmark countries, +15 population, %, earliest and latest years available*



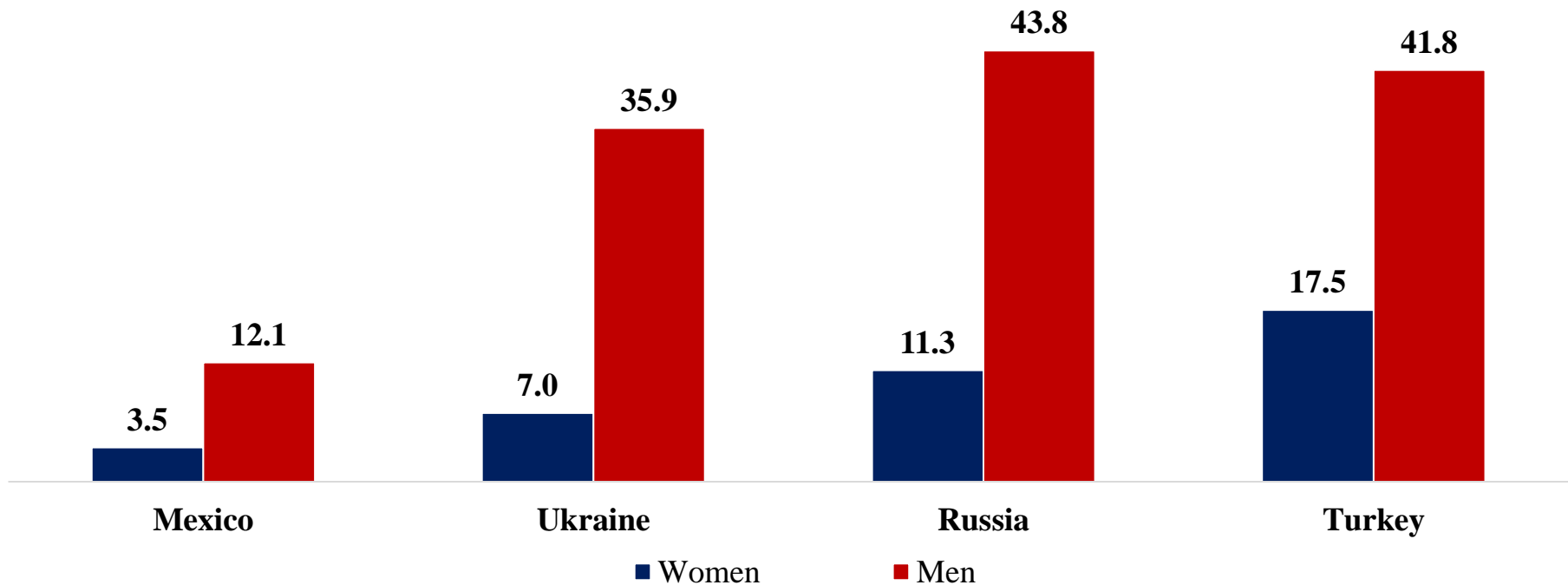
Source: CDC, GATS micro data and fact sheets, TEPAV calculations

Note: Respective survey years for countries are provided within the parentheses.

* Current tobacco smoking consists of both daily and not daily smoking ratios.

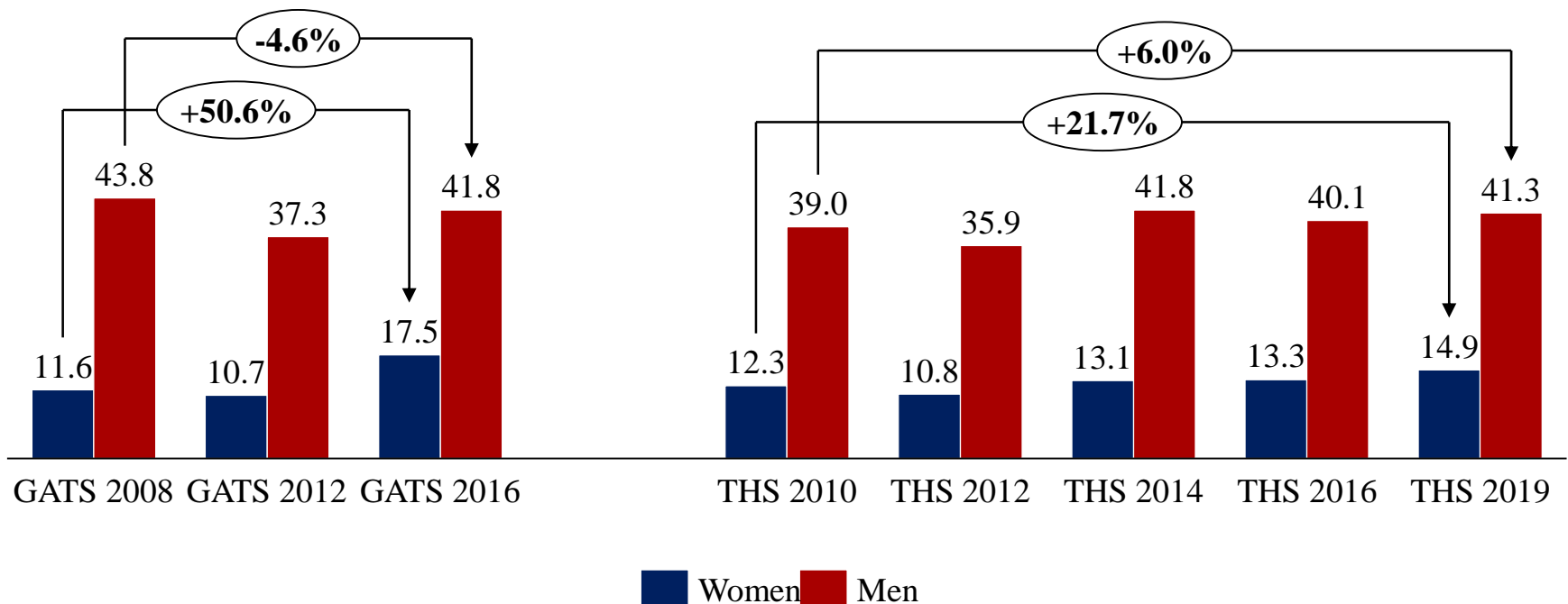
Among benchmark countries, the highest rate of tobacco use among women is in Turkey

Smoking prevalence by gender in benchmark countries, 15+ population, %, 2016



In Turkey, the daily rate of tobacco use in women increases faster than men

Daily smoking prevalence rates by gender throughout years for different data sources in Turkey, +15 population, %, 2008-2019

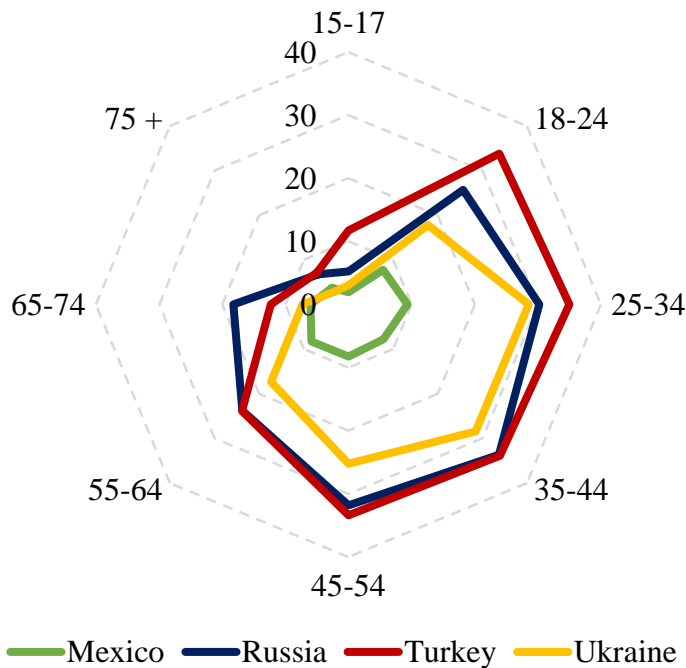


Source: CDC, GATS micro data (Turkey 2008, 2012, 2016), TurkStat, TEPAV calculations

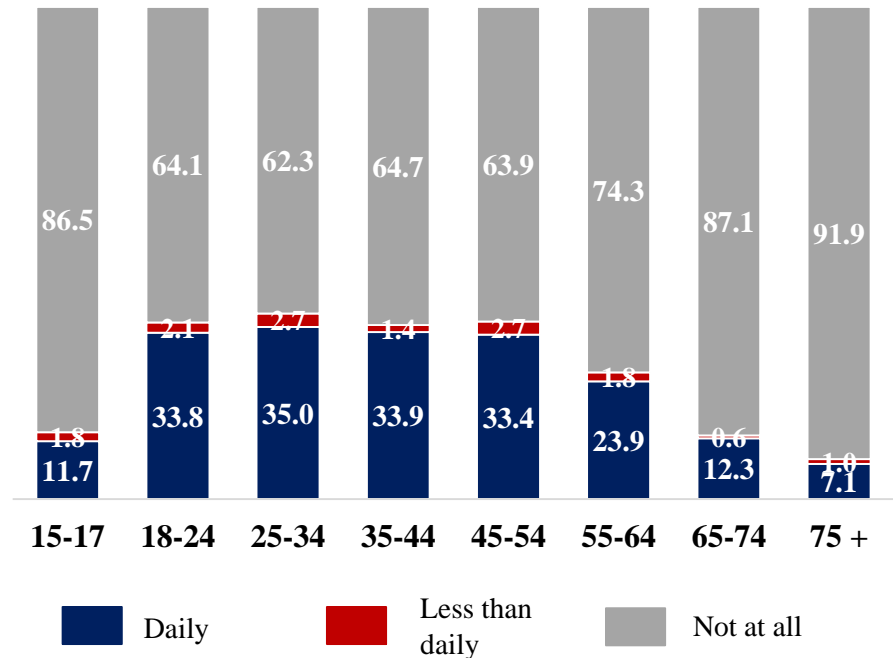
Note: The respective change rate between years is shown within arrows.

Tobacco use rates in Turkey are higher for all age groups compared to benchmark countries

Daily tobacco smoking prevalence rate in benchmark countries by age groups, +15 population, % 2016

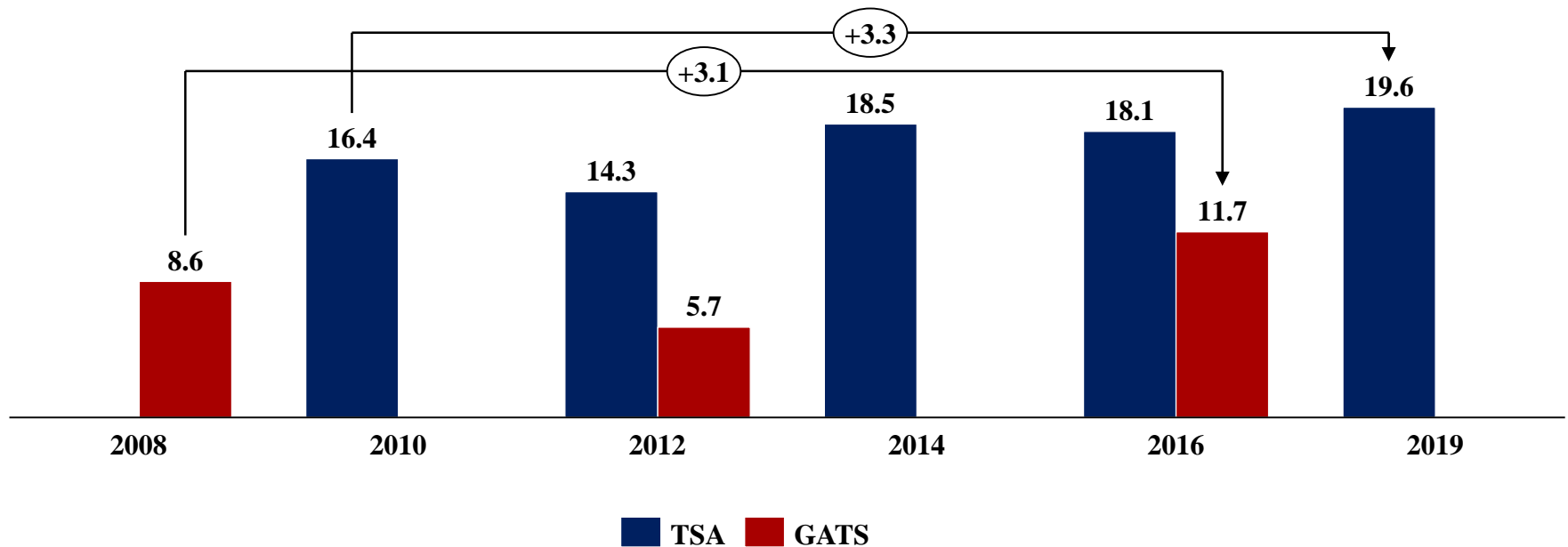


Shares of various age groups that smoke in Turkey, +15 population, %, 2016



Over the years, there has been an increase in daily smoking prevalence rates among young people aged 15-17

Daily smoking prevalence rates for youth between the ages of 15 and 17 throughout years and different data sources in Turkey, %, 2008-2019



Tobacco use among students aged 13-15 is increasing at an alarming rate

Share of students in Turkey aged between 13 and 15 who currently use any tobacco product, %, 2003-2017

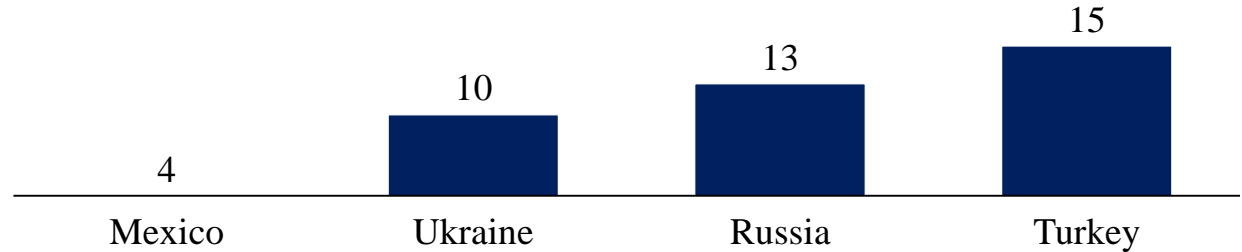


Source: CDC, GYTS Fact Sheets, TEPAV calculations

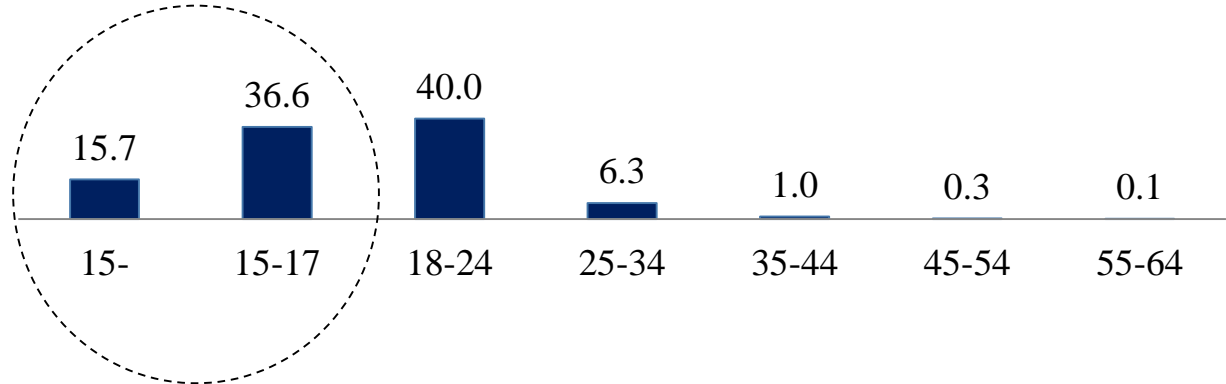
Note: * 2005 GYTS Survey was conducted via cooperation with the Institutions of Child Protective Services in Turkey. A census sample was taken of all institutionalized students in the qualifying forms in the Turkey- Institutions of Child Protective Services. For the years 2003, 2009, 2012, and 2017, geographic survey coverage was national.

The country with the highest percentage of daily tobacco smokers starting before the age of 18 is Turkey

Share of the daily tobacco smokers that began smoking under the age of 18 in benchmark countries, +15 population, %, 2016



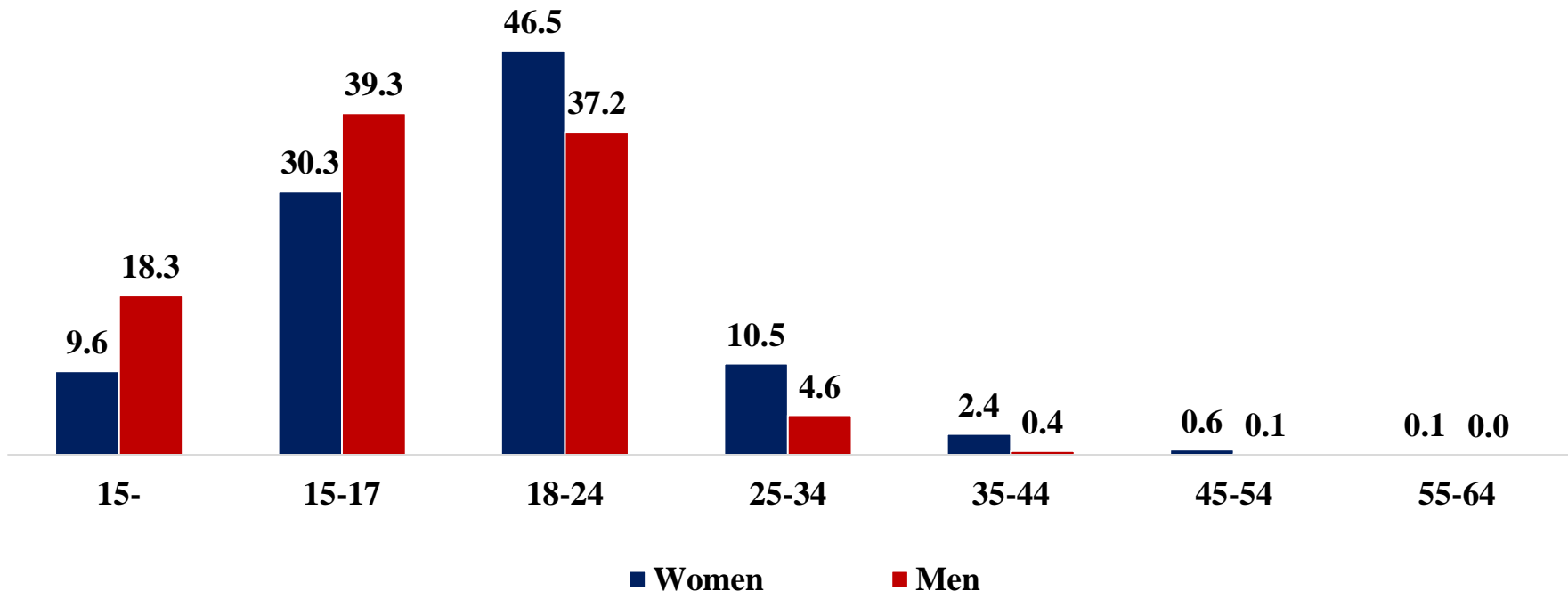
Starting age for smoking daily in Turkey, % of current daily smokers, 2016



Starting age for smoking differs between men and women

The percentage of women who start daily tobacco use before the age of 18 in Turkey is much higher than in many countries around the world

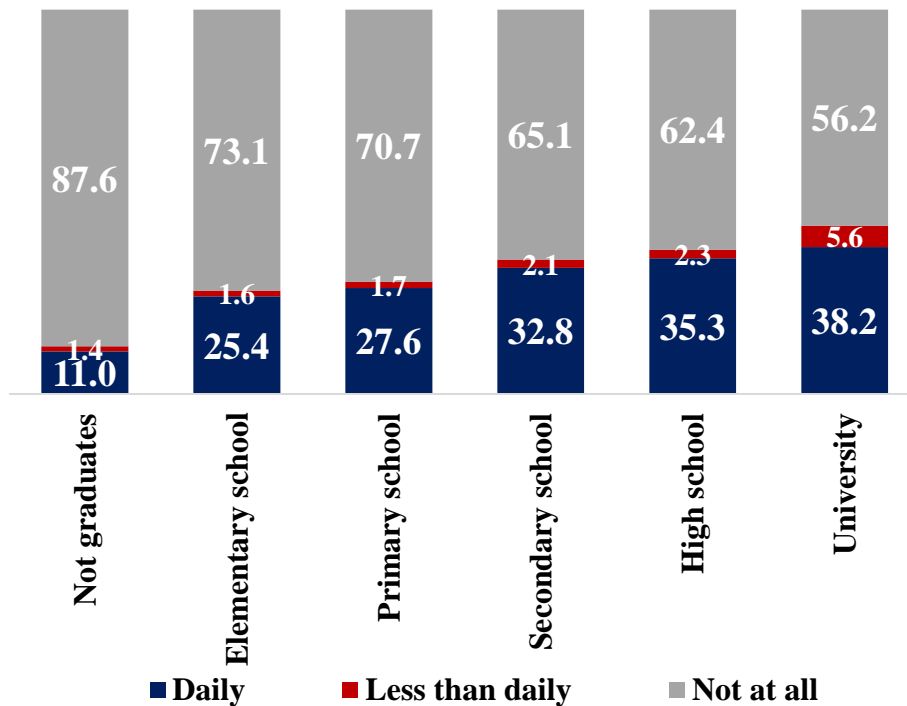
Starting age for smoking daily in Turkey by gender, % of current daily smokers, 2016



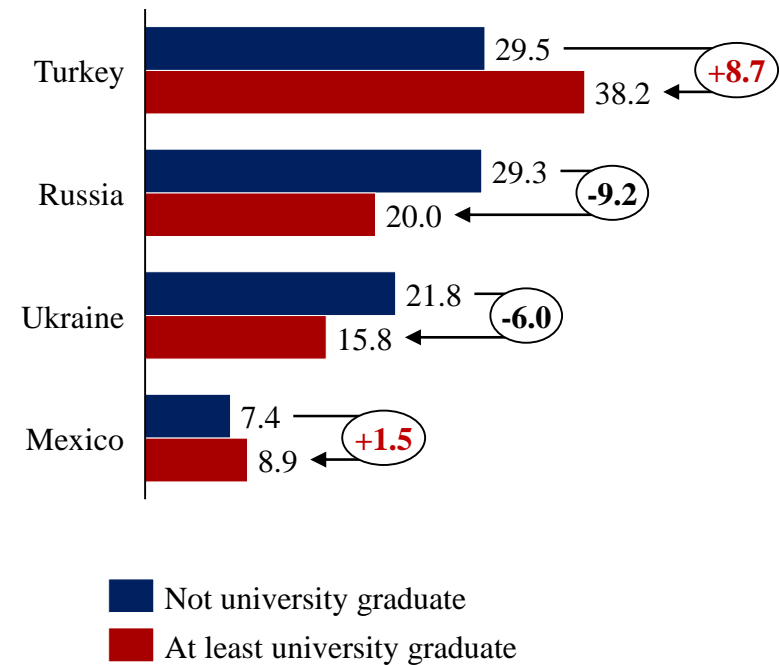
There is a positive correlation between tobacco use and education level in Turkey

The opposite is the case in benchmark countries

Tobacco smoking according to level of education in Turkey, +15 population, %, 2016

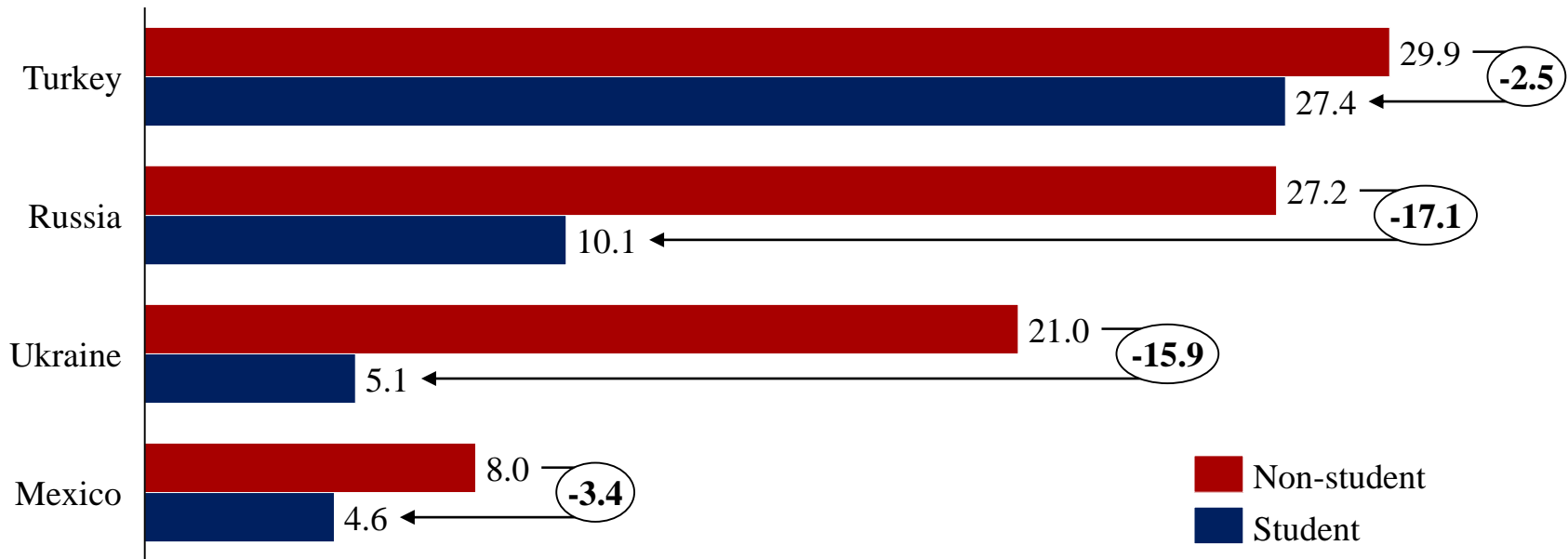


Daily smoking prevalence rates according to level of education in benchmark countries, +15 population, %, 2016



The usage rates of student in Turkey are higher compared to benchmark countries

Daily smoking prevalence rates according to student/non-student status of individuals in benchmark countries, +15 population, %, 2016



Information on the health effects and economic consequences of tobacco use is asymmetrical and incomplete

- ➔ Those who decide to start using tobacco in Turkey are mostly young people who do not fully understand the risks of tobacco use
- ➔ Many effects of tobacco use can manifest themselves years later
- ➔ The time difference between cause and effect and other possible risk factors make it difficult to see the full effects of tobacco consumption

The public should be informed in a more focused manner about the direct and indirect effects of tobacco consumption on health

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**The Economics of Preventing and Quitting
Tobacco Use in Turkey**

Supply, demand, health, and public policy aspects

Turkey's tobacco control policies

MPOWER measures consist of price-based and non-price measures

		Measures
Non-price measures	Monitor	Monitoring tobacco use and protection policies
	Protect	Protecting people from tobacco smoke
	Offer	Offering help/support to those who want to quite smoking
	Warn	Warning the public about the harms of tobacco
Price-based measures	Enforce	Prohibition of Tobacco Advertisement, Promotion, and Sponsorship
	Raise	Raising taxes on tobacco products

Note: MPOWER provides key indicators and metrics to guide countries in controlling different aspects and dimensions of tobacco use.

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**The Economics of Preventing and Quitting
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Price-based measures

The calculation of the SCT on cigarettes in Turkey varies depending on the retail sale price of the cigarette

Example

Rates			
VAT	SCT1- Specific Excise Tax, per package	SCT2- Minimum Specific Excise Tax, per stick	SCT3- Ad Valorem Excise Tax
15.25%	0.4539 TL	0.4569 TL	67%

Numeric Examples						
Brand	Retail Sale Price	VAT	SCT1	SCT2	SCT3	Total Tax Burden
A	18 TL	2.75 TL	0.4539 TL	9.138 TL	12.06 TL	84.77%
B	12 TL	1.83 TL	0.4539 TL	9.138 TL	8.04 TL	95.18%

Applied to both brands

The higher of the two amounts will be applied

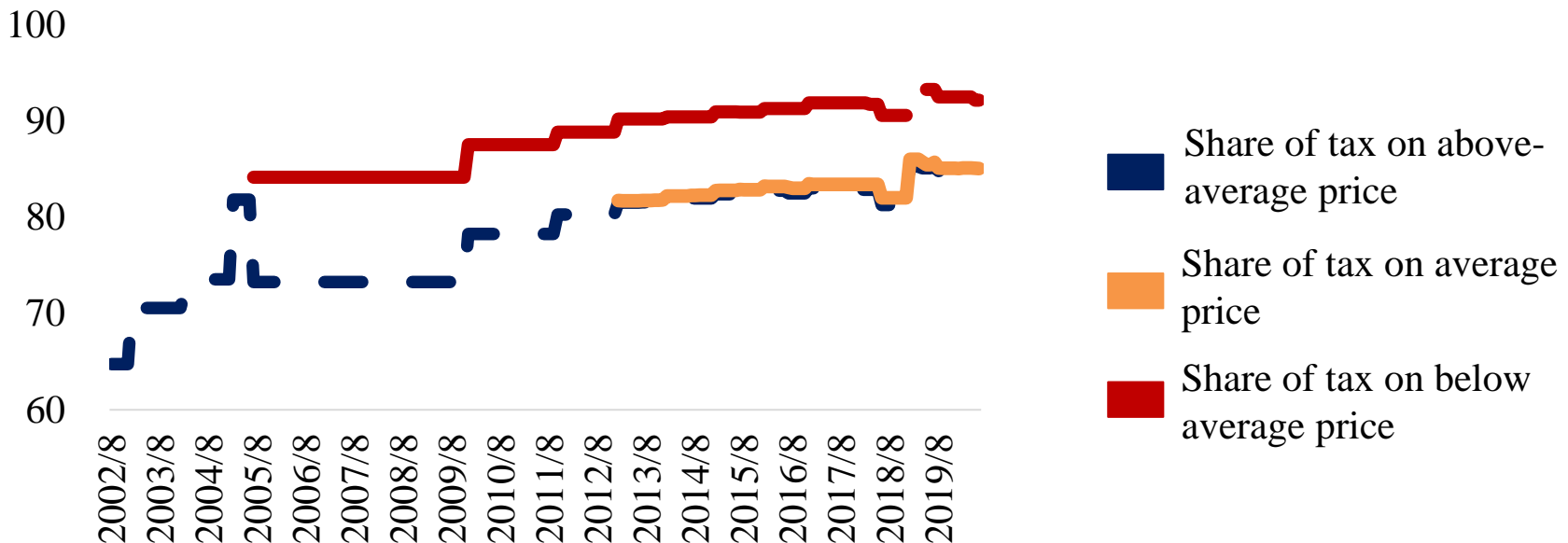
Source: 8305 Özel Tüketim Vergisi Kanunu, Deloitte Verginet, T.C. Cumhurbaşkanlığı Mevzuat Bilgi Sistemi, T.C. Hazine ve Maliye Bakanlığı Gelir İdaresi Başkanlığı, T.C. Resmi Gazete, TÜRMOB, TEPAV compilations and calculations

Note: Applied tax amounts are highlighted with light blue.

This conditional tax structure determines the minimum retail price to be applied

Relatively higher tax rates can be applied to brands in the lower priced group

Total tax burden on differently priced cigarettes in Turkey after introducing of the SCT, % of retail price, 2002 August - 2020 June



Kaynak: 8305 Özel Tüketim Vergisi Kanunu, Deloitte Verginet, online newspapers, T.C. Cumhurbaşkanlığı Mevzuat Bilgi Sistemi, T.C. Hazine ve Maliye Bakanlığı Gelir İdaresi Başkanlığı, T.C. Resmi Gazete, TurkStat, TÜRMOB, TEPAV calculations

*See the report for more detailed information

Turkey is one of the countries with the highest tax burden on tobacco products



The tax burden in the sales price exceeded 70 percent in 57 of 184 countries (2018)



Turkey was among the top 20 countries



The total tax burden applied to cigarettes in EU countries is 80.3 percent on average. In Turkey, in 2020;



Cigarettes with *above-average* and *average price*: 84.8 percent

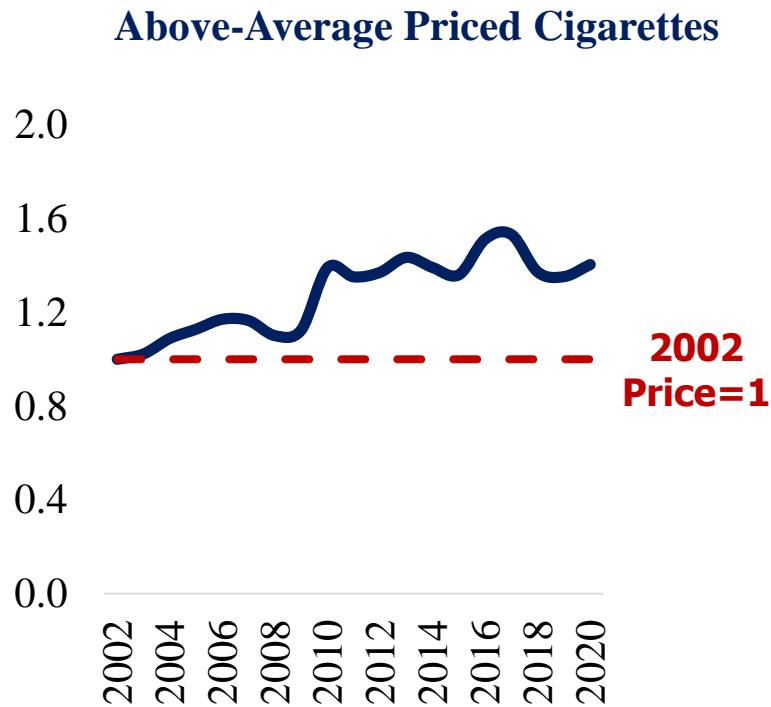


Cigarettes with a *below-average price*: 92.1 percent

Cigarette prices in Turkey increase in parallel with the increase in the tax burden

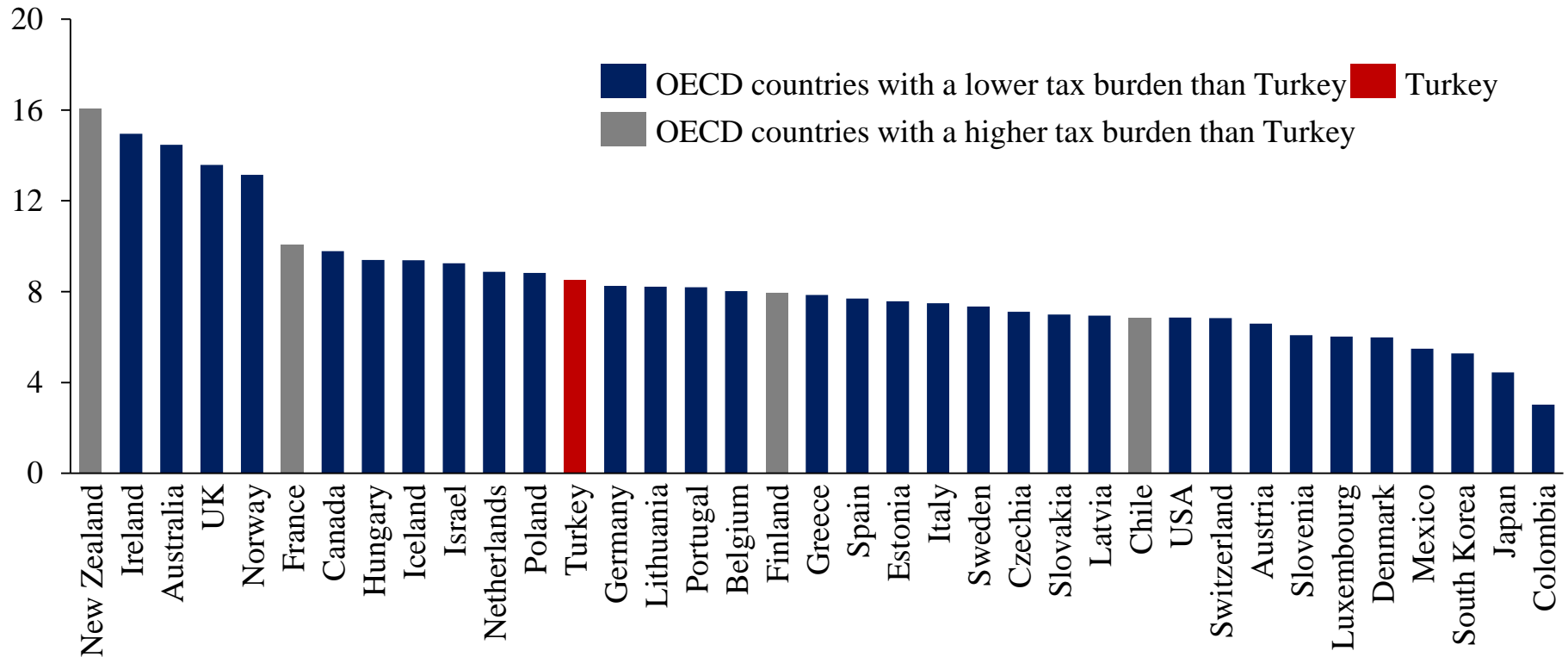
Cigarette prices in Turkey increase in parallel with the increase in the tax burden

Real price index for two groups of cigarettes in Turkey



Yet, despite the increase in cigarette prices, cigarette prices in Turkey remain relatively cheap compared to OECD countries

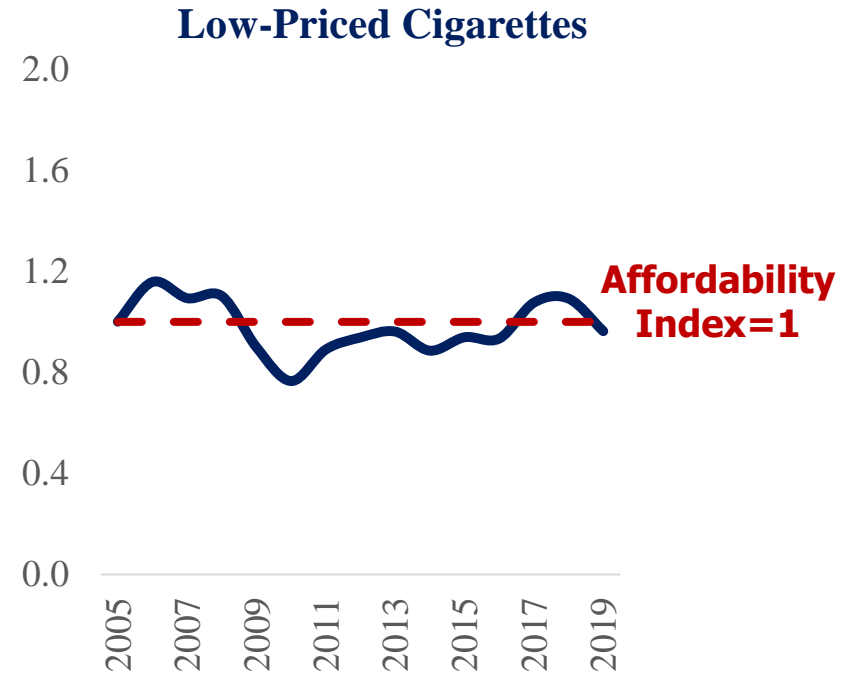
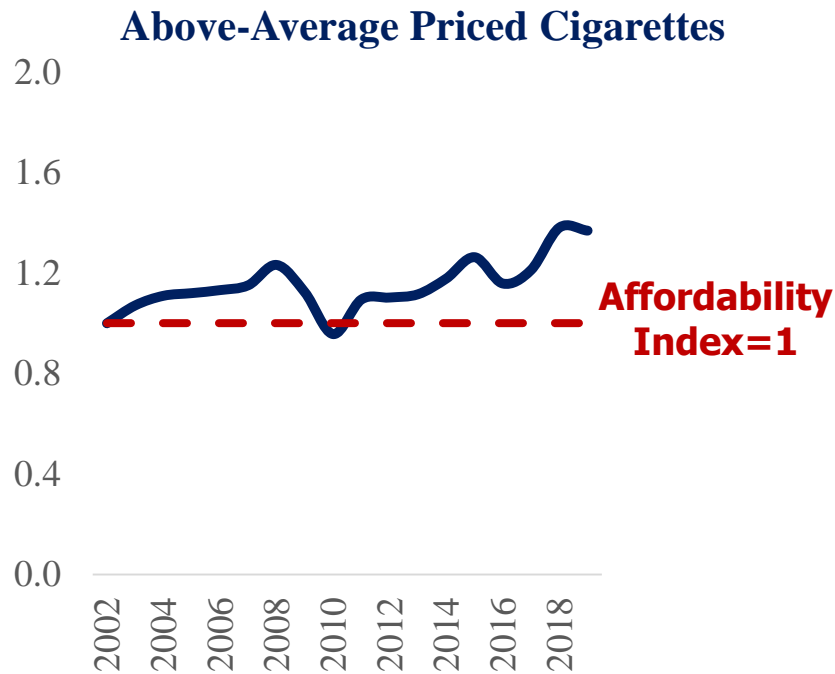
Price of a 20-cigarettes pack of the most sold brand in OECD countries, international dollars at PPP, 2018



The affordability of above-average-priced cigarettes is increasing

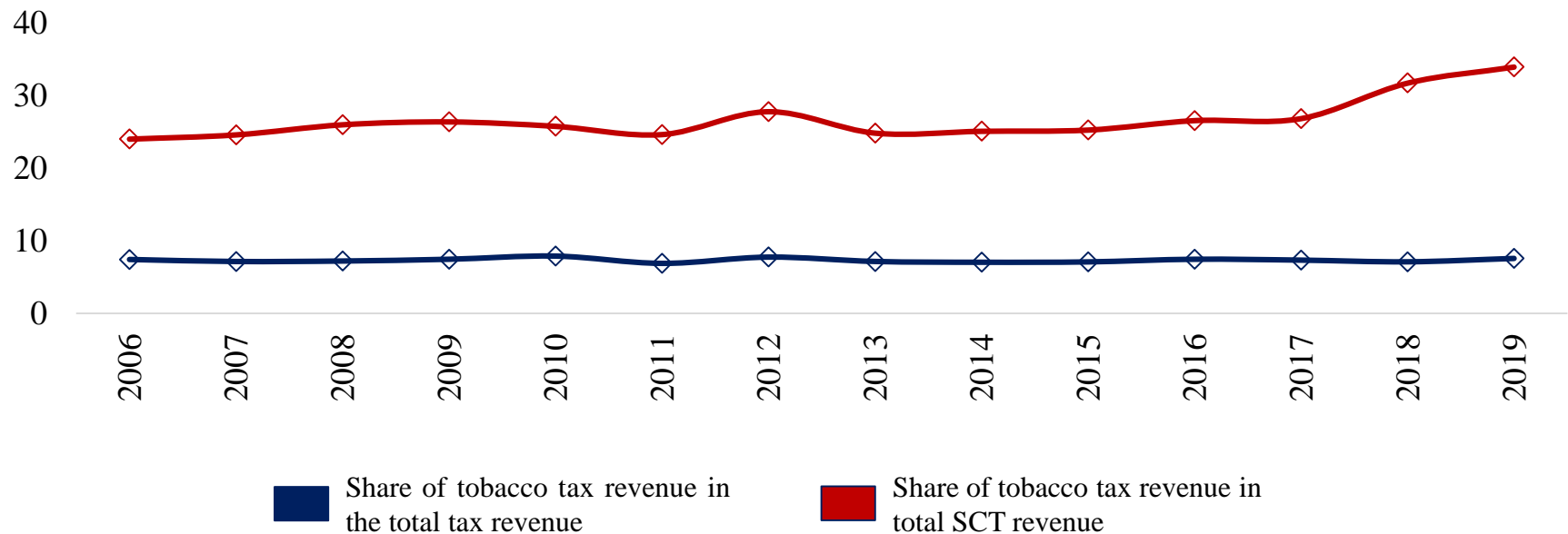
There is no significant change in the affordability of low-priced cigarettes

Affordability index for the two groups of cigarettes in Turkey



In Turkey, 7.6 percent of total tax revenues and 34 percent of total SCT revenues were obtained from tobacco products in 2019

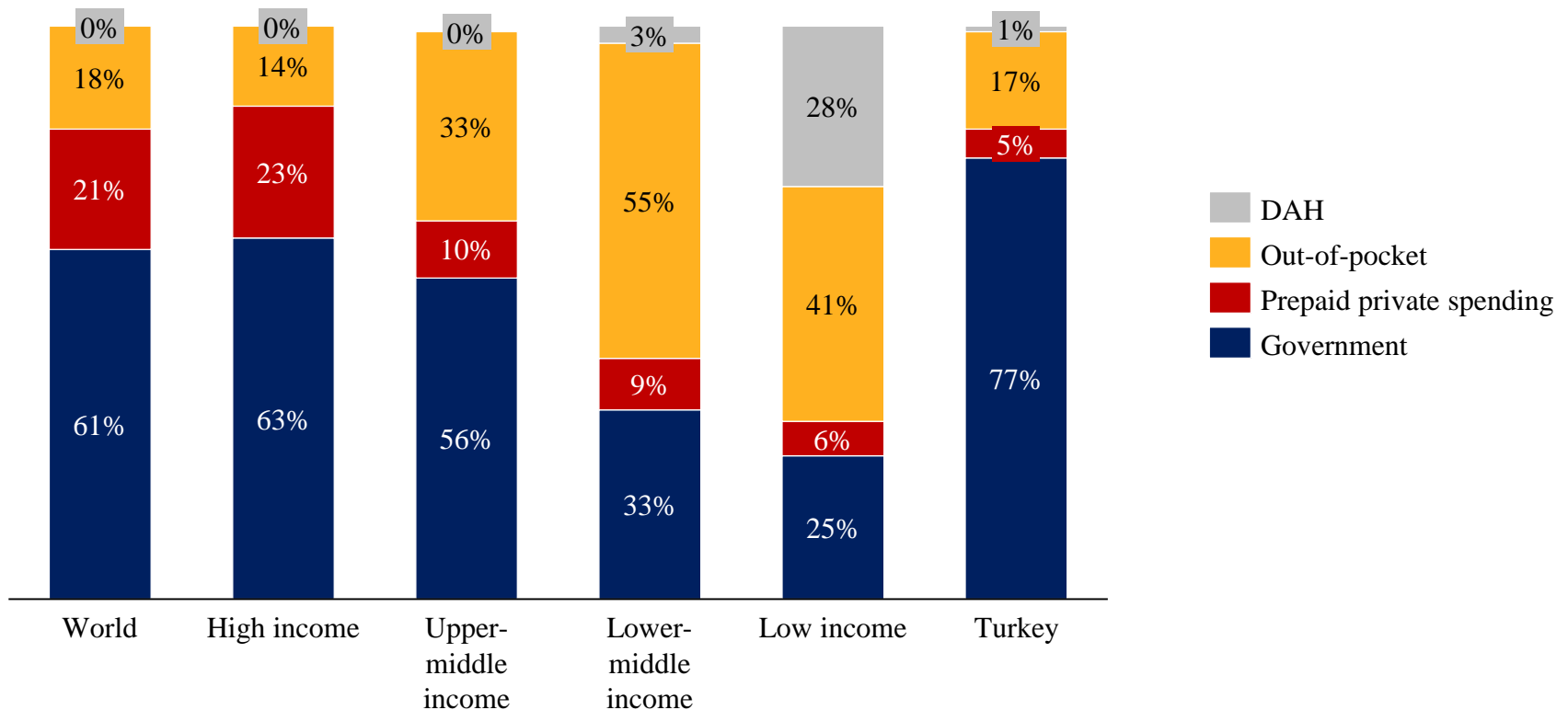
Share of tax revenues from tobacco products in Turkey, %, 2006-2019



Tobacco tax revenues in 2018 accounted for 41.8 percent of the country's total public health expenditures

It can be a highly effective source of finance to meet the externalities of tobacco use

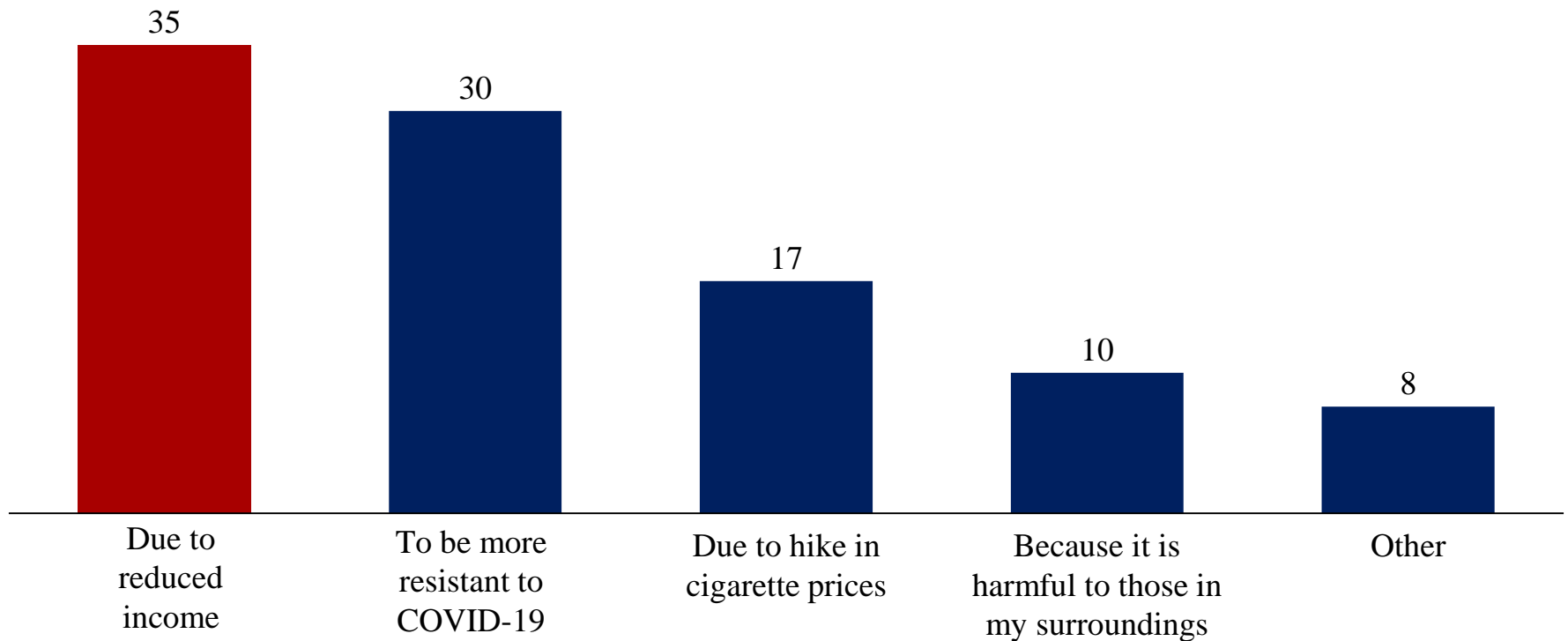
Disaggregation of health spending by funding sources, %, 2017



There is a strong relationship between purchasing power and tobacco consumption in Turkey

In the March 2020 TEPAV COVID-19 survey, 53.4 percent of participants experienced a decline in household income

Participants' main reasons for reducing their tobacco use during COVID-19, %



The current situation in Turkey reveals the need for a new perspective for the development of price-based tobacco control policies

- ➔ Despite the increase in tax revenues, the expected result in usage rates is not observed
- ➔ Despite rising prices, the affordability of cigarettes is increasing
- ➔ Income flexibility is important in the effectiveness of taxation policies (TEPAV COVID-19 Survey, March 2020)
- ➔ Increase in tax rates triggers measured inflation rate
 - ➔ The share of cigarettes in the total inflation rate of 11.76 percent is approximately 1 percent (July 2020)
- ➔ Most of the burden of tobacco use is on the public sector

Tobacco taxes in Turkey are not directly directed towards financing tobacco control policies

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**The Economics of Preventing and Quitting
Tobacco Use in Turkey**

Supply, demand, health, and public policy aspects

**Turkey's tobacco control
policies**

Non-price measures

MPOWER measures consist of price-based and non-price measures

		Measures
Non-price measures	Monitor	Monitoring tobacco use and protection policies
	Protect	Protecting people from tobacco smoke
	Offer	Offering help/support to those who want to quite smoking
	Warn	Warning the public about the harms of tobacco
Price-based measures	Enforce	Prohibition of Tobacco Advertisement, Promotion, and Sponsorship
	Raise	Raising taxes on tobacco products

Note: MPOWER provides key indicators and metrics to guide countries in controlling different aspects and dimensions of tobacco use.

M Monitoring tobacco use and protection policies

- ➔ National field research has been carried out in Turkey to monitor tobacco use since the late 1980s
- ➔ Turkey has a successful track record of Policy performance compared to global averages in terms of monitoring policies

M Monitoring tobacco use and protection policies

Still, some Policy areas need to be addressed in more depth

- All national research results and microdata should be made available to researchers
- More scientific studies should be conducted to measure the economic impact and gains of tobacco control policies in Turkey
- Policies and programs for specific subgroups (e.g. Women, children, youth, teachers, doctors, etc.) should be designed and monitored
- Monitoring activities should be updated in line with the latest developments

P Protecting people from tobacco smoke

- ➔ Policies to provide comprehensive protection against tobacco smoke in all indoor and public spaces are publicly accepted
- ➔ However, despite the progress made, exposure to passive smoking at home and at work remains high
- ➔ Despite the laws enacted to protect people from tobacco smoke in public places in Turkey, problems are encountered in practice

28.0 percent of adults in Turkey state that smoking occurs indoors in cafes, coffee houses or tea shops

Indicators showing violations of restrictions on smoking in certain places among benchmark countries, %, 2012 and 2016

Question	Response	Turkey (2012)	Turkey (2016)	Russia (2016)	Ukraine (2017)	Mexico (2015)
Did anyone smoke inside of any restaurants that you visited in the past 30 days?	Yes	12.9	12.7	20.0	24.0	24.6
	No	86.6	86.5	78.2	73.7	75.0
	Do not know	0.5	0.8	1.8	2.3	0.4
Did anyone smoke inside of any cafes, coffee shops, or tea houses that you visited in the past 30 days?	Yes	26.6	28.0	7.3		
	No	73.2	71.3	91.0		
	Do not know	0.2	0.6	1.7		
Did anyone smoke inside of any public transportation that you used in the past 30 days?	Yes		4.5	10.5	8.5	24.7
	No		95.0	88.8	90.6	74.9
	Do not know		0.6	0.7	0.9	0.4
Did anyone smoke inside any taxis that you used or saw in the last 30 days?	Yes	17.1	16.0			
	No	81.3	82.6			
	Do not know	1.5	1.4			

Source: CDC, GATS micro data (Mexico (2015), Russia (2016), Turkey (2012, 2016), Ukraine (2017)), TEPAV calculations

Note: The cells with the lowest values in each row are shaded in yellow. The shade of color turns from yellow to orange as the respective value increases within the respective row.

O Offering appropriate help to quit tobacco use



It includes behavioral and pharmacological interventions to provide social and individual assistance to those who want to quit smoking

- Encouraging quitting tobacco
- Tobacco addiction treatment



Policy initiatives to prepare guidelines and handbooks on tobacco addiction treatment gained momentum after 2010

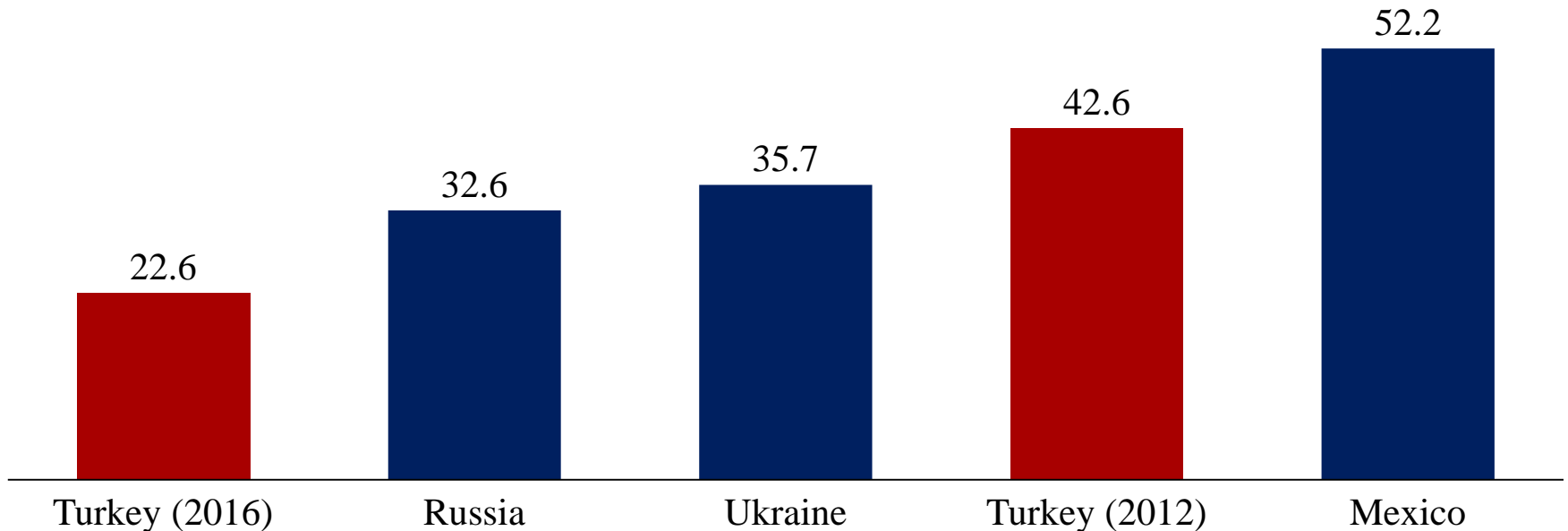
- Advice offered by healthcare professionals
- Media campaigns, free national hotlines, web pages
- Smoking cessation clinics offering free NRT



Despite these, the share of those who succeeded in quitting tobacco in Turkey is quite low

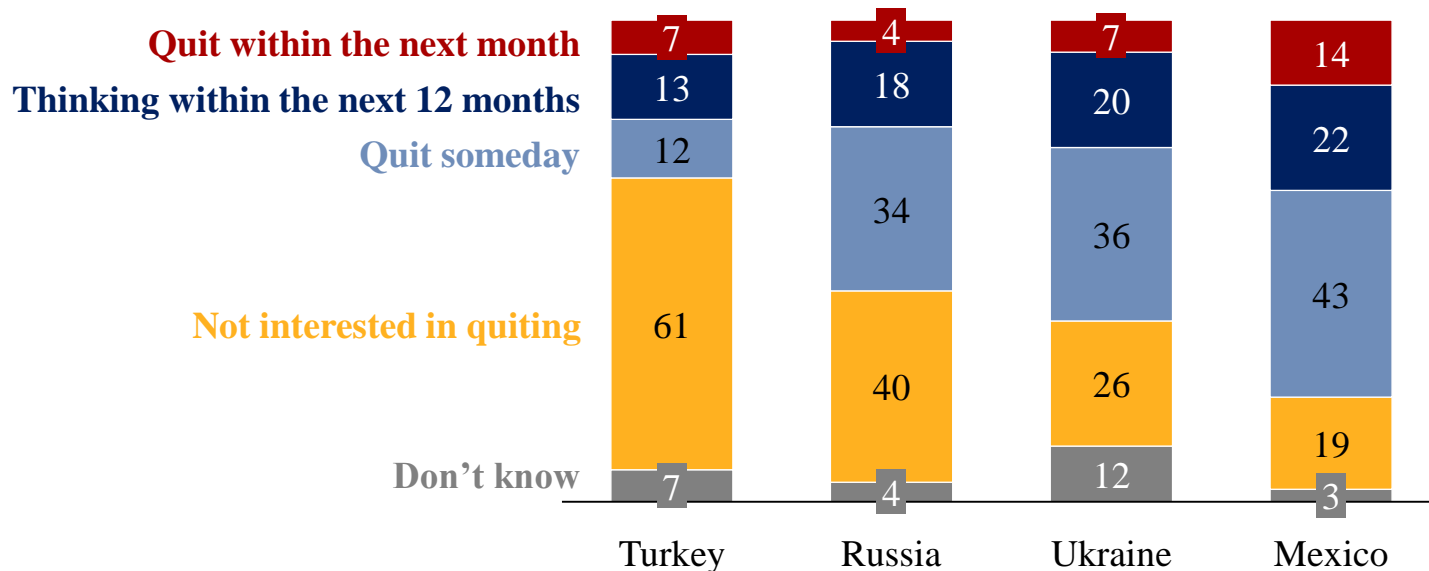
Only 22.6 percent of people who use tobacco daily in Turkey have attempted to cease smoking

Smoking cessation attempts of current tobacco users in benchmark countries, % of current adult tobacco smokers, 2012 and 2016



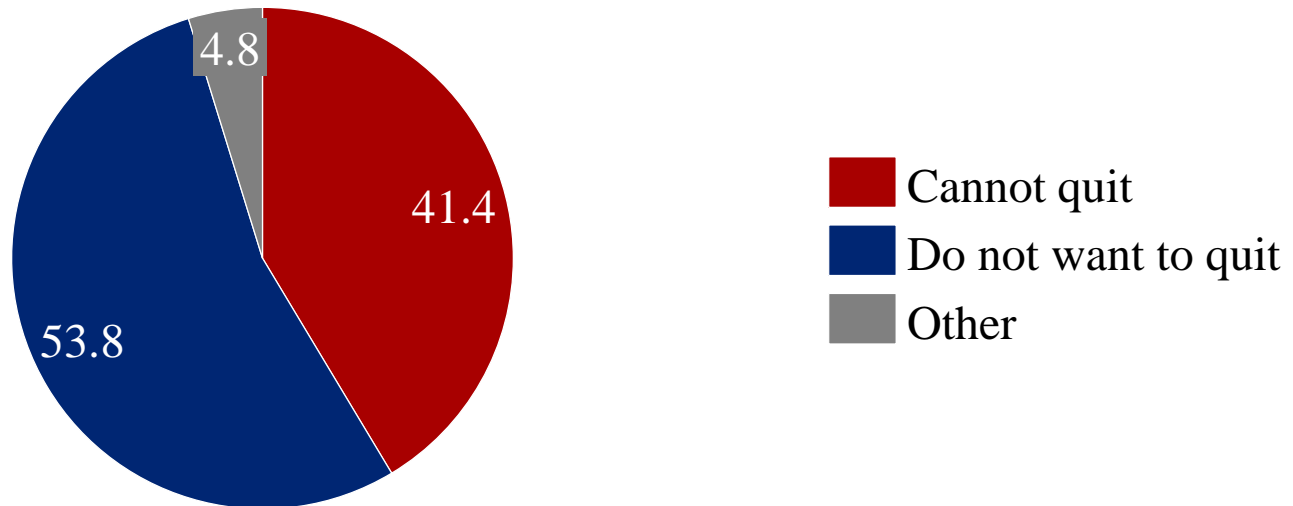
The desire to quit smoking is quite low in Turkey

Statements of the tobacco smokers about quitting smoking in benchmark countries, %, 2012 and 2016



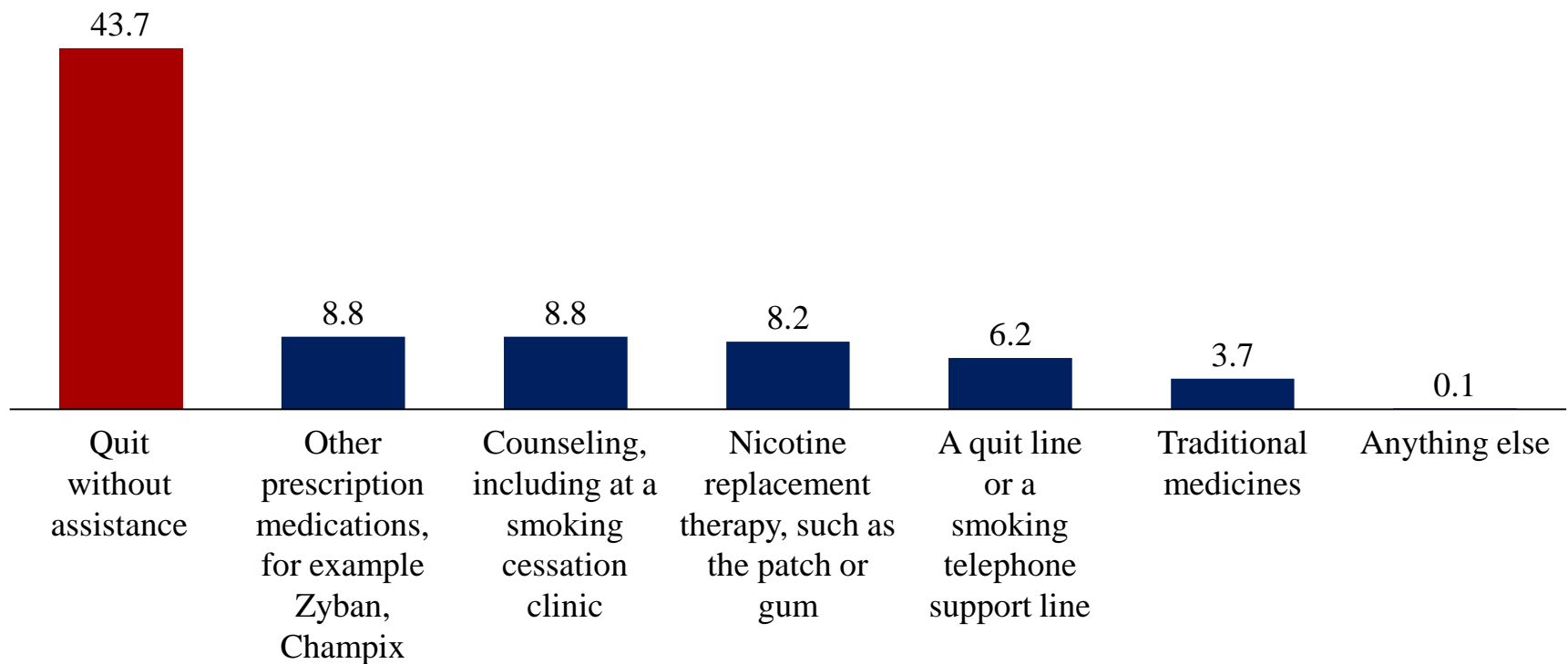
Even in pandemic conditions, 95.2 percent of smokers do not want or cannot quit smoking

Statements of the tobacco smokers about quitting smoking in Turkey, %, 2020



Most of the past smokers who stopped smoking in Turkey have done so without help

Share of past smokers according to their methods to stop smoking tobacco %, +15 population, Turkey, 2016



Source: CDC, GATS micro data (Turkey 2016), TEPAV calculations

Note: Participants may choose more than one options.

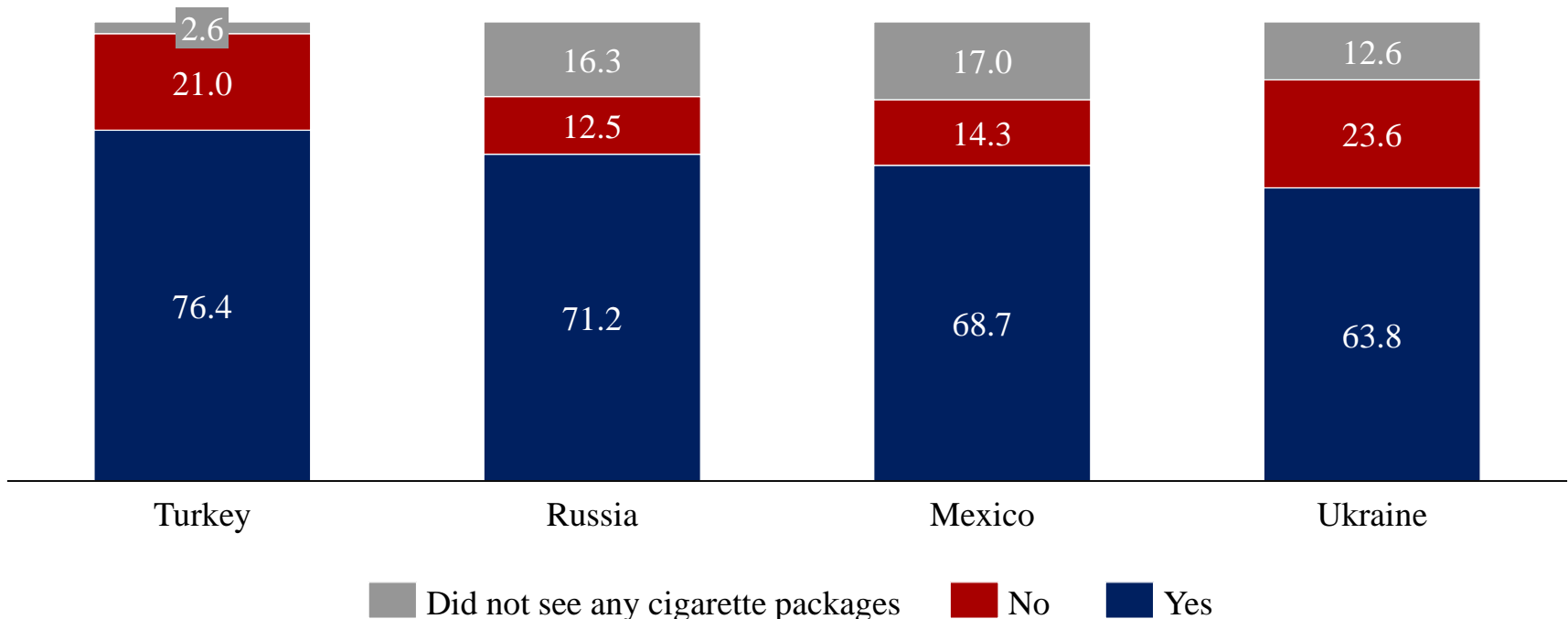
W Warning about the harms of tobacco

➔ Warning on cigarette packs in Turkey attract people's attention as intended

➔ Television is the most widely used policy tool in conveying anti-tobacco messages in Turkey

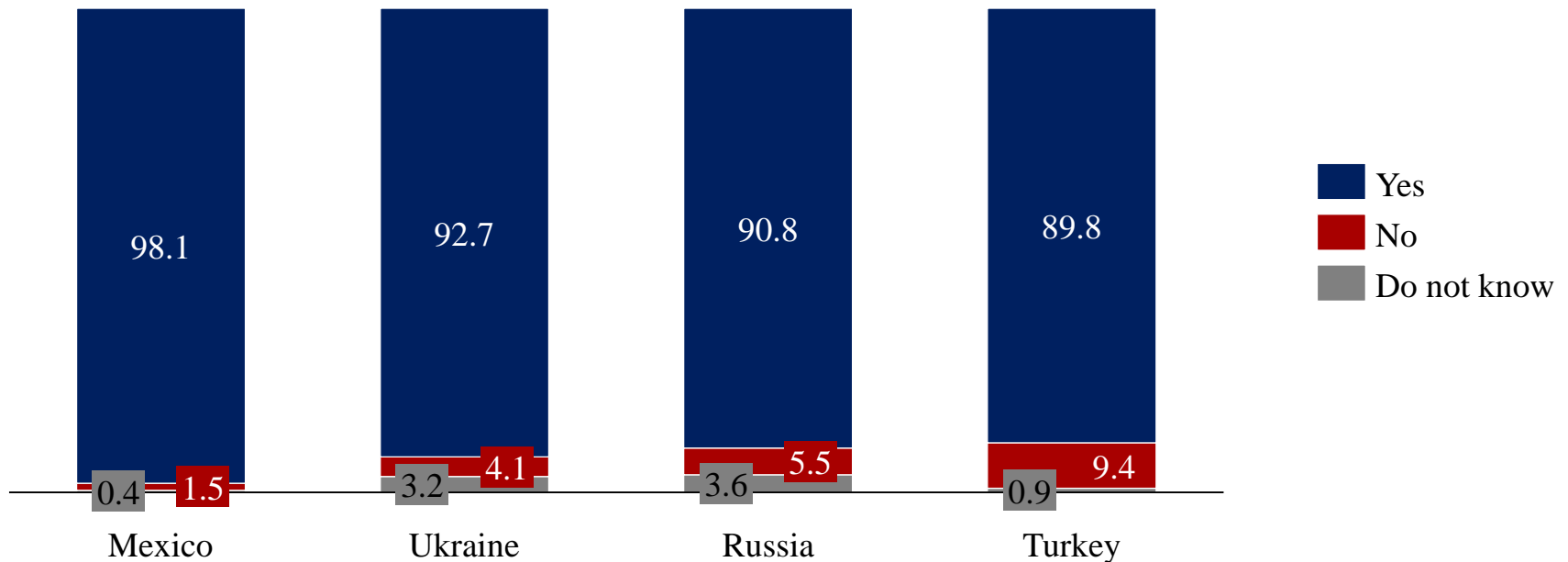
76.4 percent of adults in Turkey report that they notice the warnings on cigarette packages

Share of adults in the last 30 days noticing health warnings on cigarette packages in benchmark countries, %, 2016



It is known that with a rate of 90 percent, tobacco causes serious health problems

Share of adults knowing that smoking tobacco causes serious illnesses in benchmark countries, %, 2016

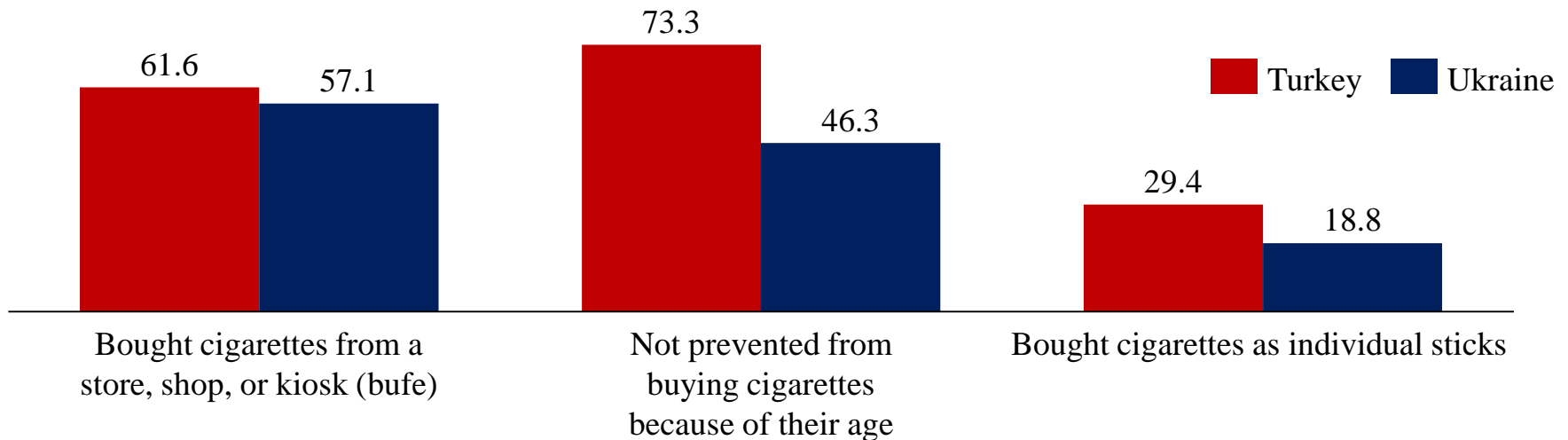


E Prohibition of Tobacco Advertisement, Promotion, and Sponsorship

- ➔ Various laws were enacted between 1996 and 2008 to limit tobacco advertising and sponsorship activities in Turkey
- ➔ Between 2014-2019, the information content on cigarette packages was regulated to prevent the promotion of products through different features
- ➔ It is forbidden to sell cigarettes to persons under the age of 18 in Turkey
 - ➔ However, it is observed that children in Turkey still have easy Access to tobacco products

Compared to Ukraine, Turkey underperforms in restricting access to cigarettes by minors

Share of current smokers who are aged between 13-15 according to their access conditions to cigarettes, Turkey and Ukraine, %, 2017



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General evaluation

The design of tobacco control policies requires considering interactions and conflicts of interest between different actors

- A holistic approach that takes into account the supply side of the market should be adopted in the design of economic policies
 - Local employment and income generation potential
 - Tax revenues
 - Foreign trade balance
- For policies to be effective on the demand side, specific demographics must be targeted
 - Tobacco use among women is increasing faster than men
 - There is a positive relationship between education level and tobacco use in Turkey
 - The age to start daily tobacco use is quite low
 - Tobacco use is very common among youth and students

There is a need to increase the effectiveness of tax policies on tobacco control

- Cigarette prices in Turkey are relatively lower than in other OECD countries
- Increase in average income limits the effectiveness of tax policies in Turkey
- The price difference between cigarette brands with different prices reduces the effectiveness of tobacco taxes
- To contribute to the updates to be made in tax policies, analytical studies that evaluate
 - The price elasticity of demand,
 - The cross-price elasticity of demand, and
 - The impact of tax changes on different socioeconomic groups are needed.

To improve the implementation processes of tobacco control policies

- Making all national research results and microdata available to researchers on the internet
- Conducting more scientific studies to determine the economic effectiveness and gains of tobacco control policies
- Cost-effectiveness analysis of different control programs by calculating the expenditures for tobacco control programs
- Designing and monitoring policies and programs for specific sub-groups (e.g. women, children, youth, teachers, physicians, etc.)

To protect people from tobacco smoke and the effects of passive smoking in public areas

There is a need to...

- Clarify which institutions are responsible for ensuring compliance with regulations and prohibitions and enforcing relevant sanctions,
- Compare the implementation and supervision of the rules and regulations in force with successful countries and eliminate the deficiencies,
- Further policy initiatives to restrict access to tobacco products by minors.

Thank you