

# **TRACK AND TRACE COMPLIANCE IN THE TOBACCO INDUSTRY**

**VOLUME 2**

**Data Collection Period:  
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# SCOPE OF STUDY

**1**

**To ascertain the level of Track and Trace (TTS) compliance at point of sale and its comparison to last year (2024)**

**2**

**To measure the compliance of Minimum Legal Price (MLP) for cigarettes mandated by Federal Board of Revenue**

**3**

**The focus of the study is limited to the retail sector to determine market dynamics**



# FIELD PICTURES





# SURVEY METHODOLOGY

## **Objective**

Check availability and types of cigarette brands which do not have TTS Stamps and/or their adherence to MLP

## **Categories:**

- Cigarettes with TTS Stamp
- Cigarettes without TTS Stamps (includes locally manufactured tax evaded brands, smuggled brands)

## **Sample**

38 markets in 19 districts, covering 40 retail outlets in each market, totaling 1520 outlets

## **Types of Points of Sale**

Pan shops, Karyana stores, Tuck shops, General stores, and others

# REGULATORY FRAMEWORK ON TOBACCO PRODUCTS

## PRINTING OF GRAPHICAL HEALTH WARNING



60% OF FRONT AND BACK  
OF CIGARETTE PACK

## IMPLEMENTATION OF TRACK AND TRACE STAMP



NO CIGARETTE PACK CAN BE  
SOLD WITHOUT AFFIXATION OF  
TAX STAMP

## MINIMUM LEGAL PRICE COMPLIANCE



NO CIGARETTE PACK CAN BE  
SOLD BELOW MINIMUM PRICE  
OF PKR 162.25

# TYPES OF BRANDS AVAILABLE IN THE MARKET

## NON-COMPLIANT BRANDS

### COMPLIANT BRANDS

- Compliant with all Government of Pakistan stipulated requirements:
  - Track and Trace Stamp
  - Graphical Health Warning
  - Printed Retail Price
  - Underage Warning
  - Manufacturer's Name
- Selling above Minimum Legal Price (PKR 162.25)

### LOCALLY MANUFACTURED DUTY NOT PAID BRANDS

- Non-compliance with any one of the stipulated requirements of Government of Pakistan:
  - Track and Trace Stamp
  - Graphical Health Warning
  - Printed Retail Price
  - Underage Warning
  - Manufacturer's Name
- Selling below Minimum Legal Price (PKR 162.25)

### SMUGGLED BRANDS

- No Track and Trace Stamp
- Not carrying GoP stipulated Graphical Health Warning
- Retail Price not Printed
- No Underage Warning
- Manufacturer's Name not Printed
- Not compliant with FED and GST Regime

# TRACK AND TRACE COMPLIANCE AT POINT OF SALE

**TOTAL NUMBER OF BRANDS FOUND\***

**477**

(+64 Compared to 2024)

**NUMBER OF BRANDS WITH TTS STAMP IN ALL DISTRICTS**

**22**

(+3 Compared to 2024)

**NUMBER OF BRANDS FOUND WITH AND WITHOUT TTS STAMP**

**14**

(+1 Compared to 2024)

**NUMBER OF LOCALLY MANUFACTURED BRANDS WITH NO TTS STAMP**

**121**

(+26 Compared to 2024)

**NUMBER OF SMUGGLED BRANDS WITHOUT TTS STAMP\*\***

**320**

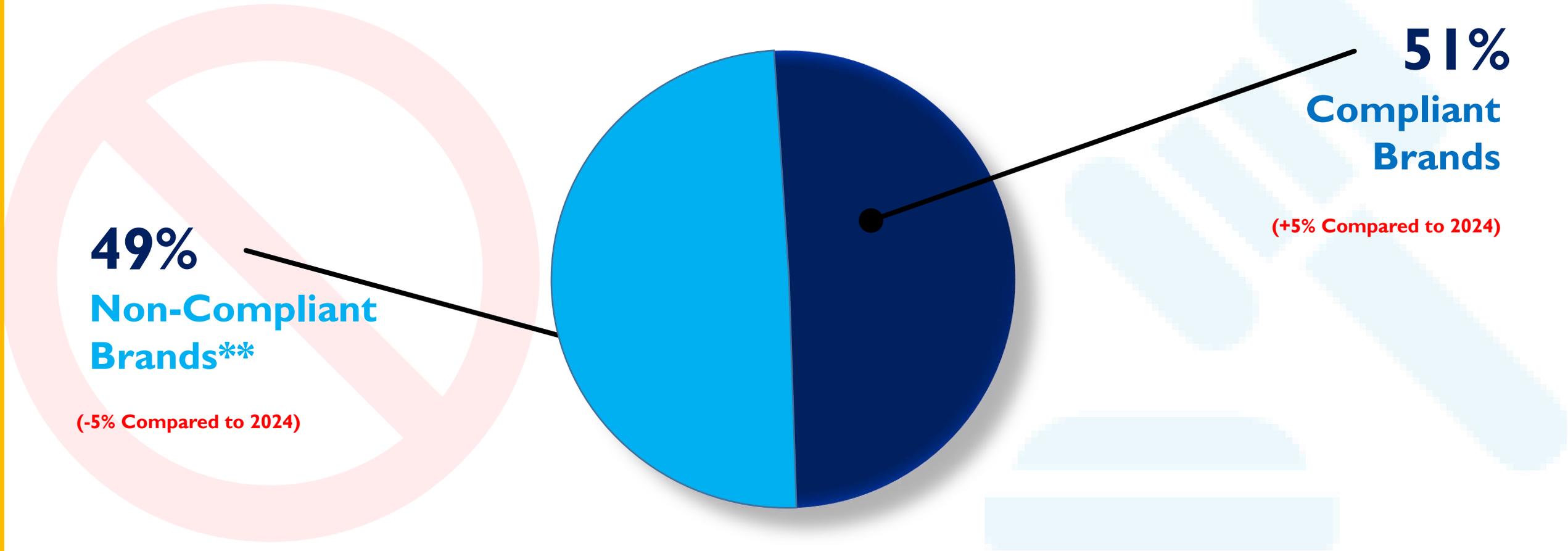
(+34 Compared to 2024)

\*The figures present only numbers of cigarette brands available in the market (not percentages)

\*\*Brands which do not have Graphical Health Warning

# TRACK AND TRACE COMPLIANCE STATUS

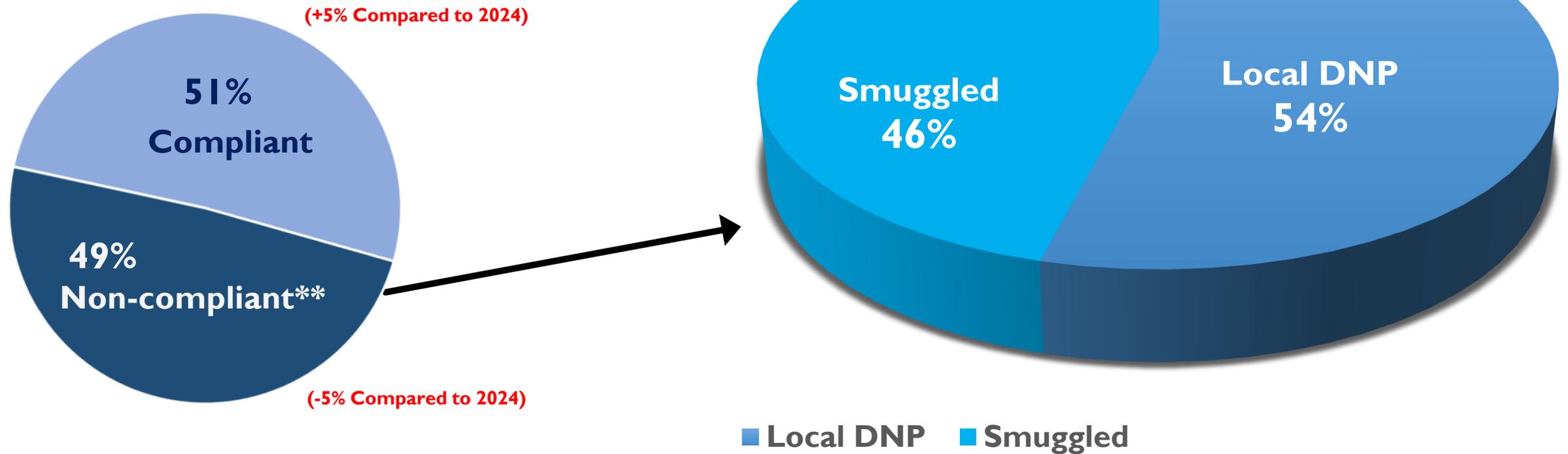
Based on brands available at point of sale\*



\*The reported distribution share is based on information provided by retailers during the survey

\*\* These include all cigarette packs with partial and/or no compliance to TTS Regime

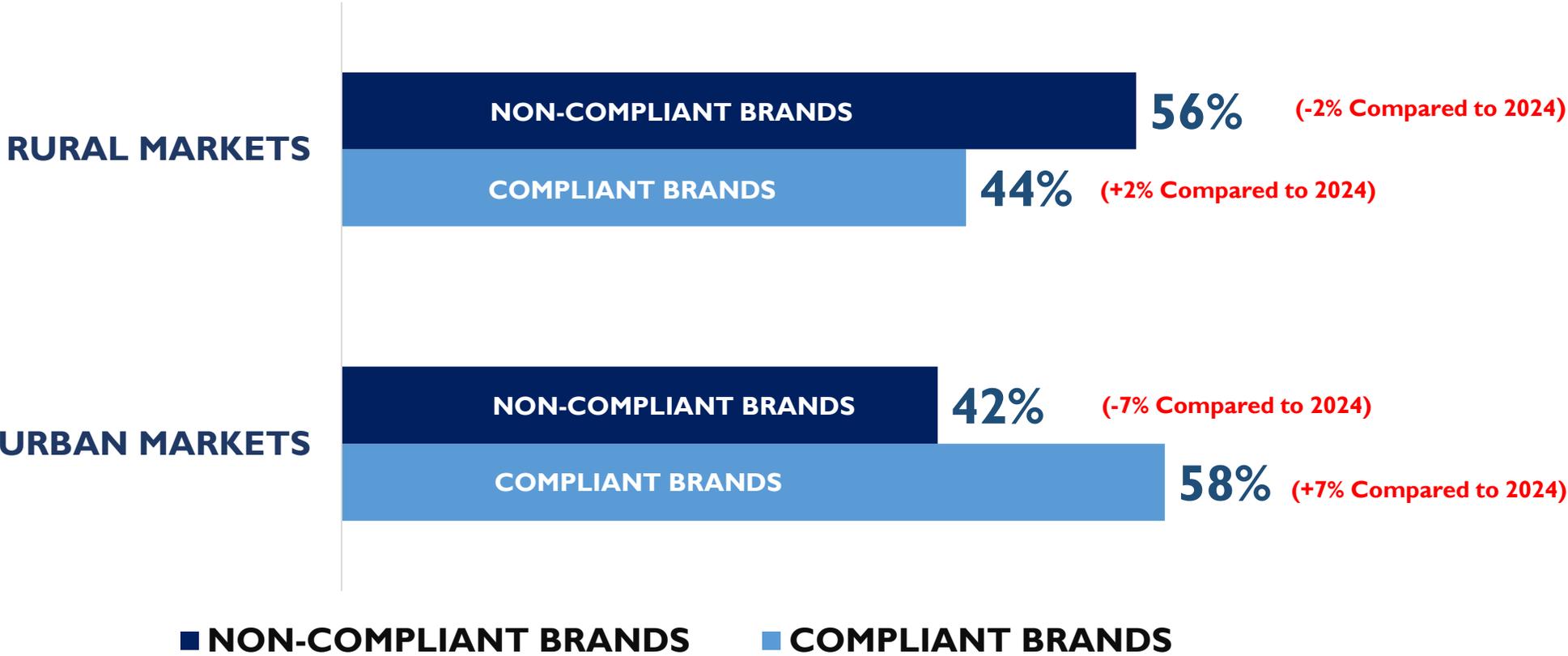
# AVAILABILITY OF NON-COMPLIANT BRANDS AT POINT OF SALE



\*The reported distribution share is based on information provided by retailers during the survey

\*\*These include all cigarette packs with partial and/or no compliance to TTS Regime

# AVAILABILITY OF NON-COMPLIANT BRANDS IN URBAN AND RURAL MARKETS



\*The Comparison is drawn from the previous IPOR study conducted in the rural areas between August and October 2024.

# MINIMUM LEGAL PRICE COMPLIANCE

**392**

BRANDS BEING SOLD BELOW MLP

**4\***

BRANDS WITH PARTIAL TTS COMPLIANCE BEING SOLD ABOVE MLP

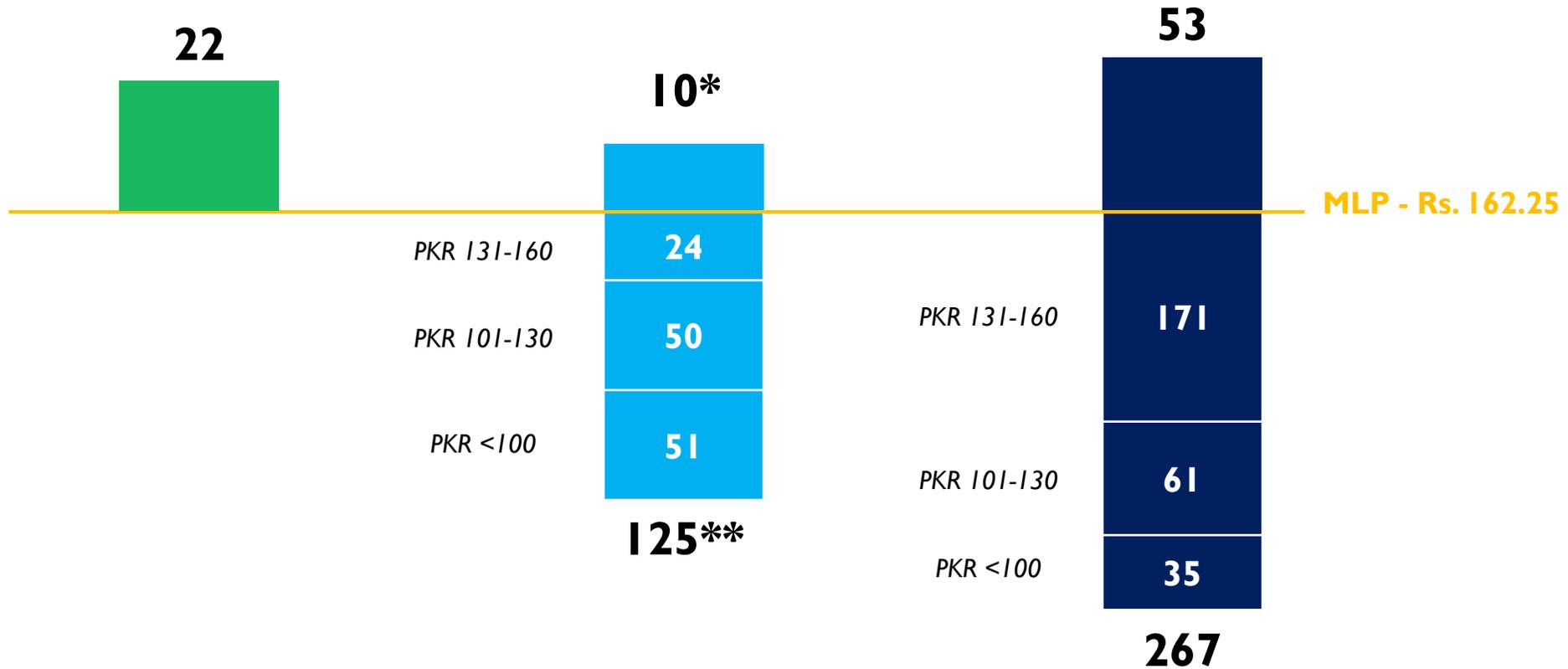
**10\*\***

BRANDS WITH PARTIAL TTS COMPLIANCE BEING SOLD BELOW MLP

**Compliant Brands**  
All **22 compliant brands** are selling above the MLP

**Locally Manufactured Brands**  
Only **10** out of **135 local brands** are being sold above the MLP

**Smuggled Brands**  
Only **53** out of **320 smuggled brands** are being sold above the MLP



# RESULTS SUMMARY

477

**TOTAL NUMBER OF BRANDS FOUND**

(+64 Compared to 2024)

455

**TOTAL NON-COMPLIANT BRANDS\*\***

(+61 Compared to 2024)

392

**BRANDS SELLING BELOW MINIMUM LEGAL PRICE\*\*\***

(+60 Compared to 2024)

195

**BRANDS BEING SOLD BETWEEN PKR 131-160**

(-2 Compared to 2024)

PKR 50

**LOWEST PRICE OF A CIGARETTE PACK**

\*Based on availability at point of sale. The reported distribution share is based on information provided by retailers during the survey

\*\*Brands which did not have one or more of the following: No Track and Trace Stamp, No Graphical Health Warning, Non-adherence to minimum legal price and no printed retail price

\*\*\*Brands which sell below the minimum legal price of PKR 162.25

# RECOMMENDATION TO ENHANCE COMPLIANCE

## **Two Pillars of Action**

- Operational Controls: On-ground enforcement at retail level and throughout the supply chain
- Tax Changes: Use of taxation and pricing tools to enhance revenue collection

## **Intended Outcomes**

- Increased Government Tax Revenue
- Sustainable Business Environment for Legitimate Players
- No Increase in Health Burden from Smoking

## **Recommendations**

- The IPOR study revealed persistent non-compliance with TTS and widespread market availability of illicit brands
- These findings point to the need for alignment between administrative enforcement and fiscal discipline
- Isolated administrative focus may yield limited results and must go hand in hand with fiscal changes to enhance compliance.

# ANNEXURES

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
1	DUNHILL SWITCH	633	650	Yes	Yes
2	DUNHILL BLUE	583	600	Yes	Yes
3	DUNHILL SPECIAL	583	600	Yes	Yes
4	JOHN PLAYER GOLD LEAF	483	500	Yes	Yes
5	BENSON & HEDGES (B&H)	283	283	Yes	Yes
6	LUCKY STRIKE BERRY	242	250	Yes	Yes
7	LUCKY STRIKE MINT	242	250	Yes	Yes
8	CAPSTAN FILTER	242	250	Yes	Yes
9	JOHN PLAYER	242	250	Yes	Yes
10	CAPSTAN ELITE BY PALL MALL	242	250	Yes	Yes
11	CAPSTAN BY PALL MALL	232	240	Yes	Yes
12	EMBASSY	232	240	Yes	Yes
13	GOLD FLAKE BY ROTHMANS	232	240	Yes	Yes
14	CAPSTAN INTERNATIONAL	191	200	Yes	Yes
15	MARLBORO GOLD	533	550	Yes	Yes
16	MORVEN BY CHESTERFIELD	232	240	Yes	Yes
17	RED & WHITE SPECIAL	242	250	Yes	Yes
18	PARLIAMENT	212	220	Yes	Yes
19	RED & WHITE FILTER	191	200	Yes	Yes
20	DIPLOMAT	182	190	Yes	Yes
21	CRAFTED BY MARLBORO	172	180	Yes	Yes
22	MORVEN CLASSIC	163	170	Yes	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
23	CAFÉ KING SIZE FILTER	221.25	180	Partial	Yes
24	CHAMPION INTERNATIONAL	162.25	110	Partial	Yes
25	BUSINESS CLASS	162.25	130	Partial	Yes
26	KISAN	162.25	180	Partial	Yes
27	LISTON	162	150	Partial	Yes
28	DECENT ROYAL LIGHT BLEND	218.3	100	Partial	Yes
29	HONDA	162.25	110	Partial	Yes
30	NINE BLUE	162	140	Partial	Yes
31	ALL WIN CLASSIC	177	100	Partial	Yes
32	RIDER	162.25	100	Partial	Yes
33	GOLD STREET CLASSIC	202.83	190	Partial	Yes
34	GOLD STREET INTERNATIONAL	162.25	160	Partial	Yes
35	RED SHINE	202.7	140	Partial	Yes
36	MELBURN KING SIZE	218.3	190	Partial	Yes
37	777 ORIGINAL	62.76	130	No	Yes
38	ADVISOR	162.25	100	No	Yes
39	AL PINE LIGHTS	194.7	130	No	Yes
40	ARMEE SPECIAL BLEND	221.25	150	No	Yes
41	BADSHA	63.78	100	No	Yes
42	BATTER	202.83	140	No	Yes
43	BEST	162.25	130	No	Yes (Old)
44	BLACK EAGLE	162.25	100	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
45	BOAT	147.5	110	No	Yes
46	BOSS	161.66	140	No	Yes
47	BRIDGE	140	150	No	Yes
48	BUILDER	48	130	No	Yes (Old)
49	BUSINESS PLUS BLUE EDITION	147.5	130	No	Yes
50	CANTON	161.66	120	No	Yes
51	CAPITAL GOLD	177	120	No	Yes
52	CAPTAAN ORIGINAL	208.8	120	No	Yes
53	CAPTAIN RED	147.5	130	No	Yes
54	CASH	200.83	100	No	Yes
55	CHAMAN	165.2	70	No	Yes
56	CHAMPION LIGHTS	146.32	100	No	Yes
57	CHANCE NO 1	140	100	No	Yes
58	CHASE ORIGINAL	162.25	120	No	Yes
59	CHEETAHS	162.25	120	No	Yes
60	CHELSEA II	165.2	120	No	Yes
61	CHIEF	36.62	90	No	Yes (Old)
62	CITI GOLD	165.2	130	No	Yes
63	CITIZEN ORIGINAL	194.7	130	No	Yes
64	CRICKET	64.3	100	No	Yes
65	CROWN GOLD	221.2	130	No	Yes
66	DAILY PREMIUM LEAF	221.25	100	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
67	DECENT ROYAL FILTER PLUS	48	100	No	Yes
68	DUBAI LIGHTS	177	150	No	Yes
69	ENJOY INTERNATIONAL	26.1	100	No	Yes (Old)
70	FEDORA WORKER II	162.25	100	No	Yes
71	FIRE	141.6	110	No	Yes
72	FIRE LIGHTS	177	100	No	Yes
73	GIFT	45	100	No	Yes (Old)
74	GOLD MARK	166.38	140	No	Yes
75	GRACE	25.38	120	No	Yes
76	HALF TIME	50	100	No	Yes (Old)
77	HELLO INTERNATIONAL	166.38	100	No	Yes
78	HERO	140	120	No	Yes
79	HILLS	47	120	No	Yes (Old)
80	HITLER	47	130	No	Yes
81	HIWAY	202.83	180	No	Yes
82	HONDA SPECIALS	140	150	No	Yes
83	HUNTER FILTER	26	100	No	Yes (Old)
84	HUQA	20	120	No	No
85	JAZZ	11	140	No	Yes
86	KHAN SAHAB	177	130	No	Yes
87	KICK	64.18	150	No	Yes (Old)
88	LAJAWAB	162.25	100	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
89	LEADER INTERNATIONAL	165.2	120	No	Yes (Old)
90	LORD ONE KING SIZE	218.3	170	No	Yes
91	LORD ONE LIGHT	200.6	170	No	Yes
92	MARCO POLO	221.25	140	No	Yes
93	MARKET	30	120	No	Yes (Old)
94	MARKHOR TOBACCO	63	100	No	Yes
95	MARSHAL	162.25	120	No	Yes
96	MARVELS	147.5	130	No	Yes
97	MARVI GOLD	63	70	No	Yes (Old)
98	MARWIN	202.83	150	No	Yes
99	MASTER INTERNATIONAL	63.18	80	No	Yes (Old)
100	MELBURN GOLD KING SIZE	217.5	200	No	Yes
101	MERA SULTAN	200.6	150	No	Yes
102	METRO	63	100	No	Yes (Old)
103	MILAN	162.25	100	No	Yes
104	MINAR	162..25	140	No	Yes
105	MORE ONE	68.56	100	No	Yes
106	NATIONAL KING SIZE	194.7	100	No	Yes
107	NEXT INTERNATIONAL	Missing	120	No	Yes
108	OFFICER	162.25	150	No	Yes
109	OK	48	100	No	Yes (Old)
110	OLYMPIC	162.25	150	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
111	OMEGA INTERNATIONAL	32	100	No	Yes (Old)
112	ONE PLUS	162.25	100	No	Yes
113	ORIS BLUE	38.61	120	No	Yes
114	PALM GOLD	194.7	150	No	Yes
115	PALM MILD	22	120	No	Yes (Old)
116	PARK ONE KINGS EDITION	194.7	100	No	Yes
117	PARTY INTERNATIONAL	63	110	No	Yes (Old)
118	PETROL	162.25	120	No	Yes
119	PILOT	63.18	60	No	Yes
120	PRESIDENT	200.6	130	No	Yes
121	PRESS	203	170	No	Yes
122	PRIME INTERNATIONAL	194.7	110	No	Yes
123	PUBLIC LIGHT BLUE	162.25	120	No	Yes
124	PUBLIC LIGHT RED	162.25	120	No	Yes
125	PUFF	177	100	No	Yes
126	R6	162.25	150	No	Yes
127	RACER	68	90	No	Yes
128	RAMADA INTERNATIONAL	185.6	100	No	Yes
129	RANGER CLASSIC	177	120	No	Yes
130	RED & LIGHT	62.76	130	No	Yes (Old)
131	SAFARI	200.6	100	No	Yes
132	SAYEEN GOLD	163	120	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT



Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
133	SENATOR SIGNATURE BLEND	185.2	150	No	Yes
134	SMOKE STAR	208.8	100	No	Yes
135	SMOKERS	141.6	100	No	Yes
136	SMS INTERNATIONAL	162.25	130	No	Yes
137	SOLAR RANGE	141.6	120	No	Yes
138	SOLO	62	100	No	Yes (Old)
139	SOLO LIGHTS	147.5	130	No	Yes
140	SPECIAL EXPRESS	54.98	120	No	Yes (Old)
141	SPEED	62.76	100	No	Yes
142	SUPER POWER	23.8	90	No	Yes
143	SWISS INTERNATIONAL	63.18	100	No	Yes
144	T20	192.9	100	No	Yes (Old)
145	TAJ	23	120	No	Yes (Old)
146	TAJ INTERNATIONAL	194.7	130	No	Yes
147	TARGET INTERNATIONAL	162.25	100	No	Yes
148	TENDER VIRGINIA	203.83	190	No	Yes
149	THREE CUTS INTERNATIONAL	154.58	100	No	Yes
150	TOKEN	162.25	100	No	Yes
151	VICTORY	57.26	100	No	Yes (Old)
152	VISA	162.25	120	No	Yes
153	VITAL GOLD	163	150	No	Yes
154	WIN STAR INTERNATIONAL	154.58	150	No	Yes

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
155	WORLD LEAF	63.18	100	No	Yes
156	YES INTERNATIONAL	177	130	No	Yes
157	YES LIGHTS	177	100	No	Yes
158	ESSE AURA GREEN APPLE	Not Printed	130	No	No
159	252 BLUE		150	No	No
160	ABC KING SIZE		100	No	No
161	ABC LIGHTS		100	No	No
162	AL MAKHLOF		120	No	No
163	AMERICAN BISON BLUE		160	No	No
164	AMERICAN LEGEND		130	No	No
165	ARMMANI KINGS BLUE		170	No	No
166	ARMMANI KINGS RED		170	No	No
167	ASHIMA BLUE		180	No	No
168	ASIA KINGS FULL FLAVOUR RED		150	No	No
169	ASIA KINGS LIGHTS BLUE		150	No	No
170	ASTRO BLACK MENTHOL		110	No	No
171	ATTIMO SPECIAL FILTER BLUE		150	No	No
172	ATTIMO SPECIAL FILTER CLASSIC		170	No	No
173	BENSON & HEDGES (B&H)		100	No	No
174	BLACK DEVIL		180	No	No
175	BLUE TOUCH PAAN FLAVOR		100	No	No
176	BON GOLD RED LABEL		150	No	No

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
177	BONUS EXCLUSIVE	Not Printed	170	No	No
178	BONUS EXCLUSIVE RED		100	No	No
179	BONUS PREMIUM		190	No	No
180	BRASS		130	No	No
181	BUSINESS CLUB DOUBLE APPLE		150	No	No
182	BUSINESS CLUB FRESH GUM		150	No	No
183	BUSINESS CLUB GOLD		70	No	No
184	BUSINESS CLUB LIGHTS		150	No	No
185	BUSINESS CLUB STRAWBERRY		160	No	No
186	BUSINESS CLUB SWITCH		140	No	No
187	BUSINESS KING SIZE		100	No	No
188	BUSINESS KINGS		150	No	No
189	BUSINESS KINGS LIGHTS		130	No	No
190	BUSINESS MORE BLUE EDITION		140	No	No
191	BUSINESS MORE QUEEN EDITION		150	No	No
192	BUSINESS MORE RED EDITION		150	No	No
193	BUSINESS MORE SUPER SLIMS		150	No	No
194	BUSINESS ROYAL ULTRA LIGHTS		150	No	No
195	BUSINESS ROYALS		110	No	No
196	BUSINESS ROYALS BLUE		130	No	No
197	BUSINESS ROYALS CROWN	120	No	No	
198	BUSINESS ROYALS RED	150	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
199	BUSINESS ROYALS STYLE QUEEN	Not Printed	150	No	No
200	BUSINESS ROYALS ULTRA LIGHTS		120	No	No
201	CAPTAIN BLACK RED		180	No	No
202	CAPTAIN BLACK SILVER		250	No	No
203	CAVALLO SUPERSLIMS APPLE		150	No	No
204	CAVALLO SUPERSLIMS STRAWBERRY		150	No	No
205	CHECK FULL FLAVOUR		140	No	No
206	CHECK KING SIZE LIGHTS		110	No	No
207	CHUNGHWA		140	No	No
208	CIMA PREMIUM		160	No	No
209	CLOPATRA		120	No	No
210	CONINO LAMBORGHINI KING SIZE		150	No	No
211	CORSAIR BLUE MARK		120	No	No
212	COURT RED		150	No	No
213	CROME LIGHTS		150	No	No
214	D&J		200	No	No
215	DE SANTIS RED		160	No	No
216	DE SANTIS WHITE		140	No	No
217	DEAL APPLE MINT		120	No	No
218	DENIM AMERICAN BLEND BLUE		140	No	No
219	DENIM AMERICAN BLEND RED	120	No	No	
220	D-GI	120	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
221	DOLCE BLUE	Not Printed	140	No	No
222	DOUBLE HAPPINESS		100	No	No
223	DUNHILL		800	No	No
224	ELEGANCE BLACK SUPER SLIMS		140	No	No
225	ELEGANCE DOUBLE APPLE		150	No	No
226	ELEGANCE FULL FLAVOUR BLACK		180	No	No
227	ELEGANCE FULL FLAVOUR MAX		180	No	No
228	ELEGANCE FULL FLAVOUR MAX RED		150	No	No
229	ELEGANCE GUM MINT		140	No	No
230	ELEGANCE LIGHTS MAX BLUE		180	No	No
231	ELEGANCE MENTHOL NANO		140	No	No
232	ELEGANCE SPEAR MINT		200	No	No
233	ELEGANCE STRAWBERRY		150	No	No
234	ELEGANCE ULTRA LIGHTS		120	No	No
235	ELEGANCE ULTRA LIGHTS MAX		150	No	No
236	ELEGANCE VIRGINIA BLEND RED		140	No	No
237	ELYSEE		140	No	No
238	EMPIRE BLUE EDITION		100	No	No
239	EMPIRE KING SIZE		140	No	No
240	ENGLISHMAN KING SIZE FILTER		140	No	No
241	ESSE AURA		200	No	No
242	ESSE AURA PINK STRAWBERRY		130	No	No
243	ESSE BLUE		150	No	No

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
244	ESSE CHANGE GRAPE FLAVOR	Not Printed	150	No	No
245	ESSE SILVER		150	No	No
246	ESSE SUPERSLIM		150	No	No
247	EUROPE		160	No	No
248	FARSTAR		150	No	No
249	FINE		100	No	No
250	FISHER SUPER SLIMS LIGHTS		110	No	No
251	FISHER ULTRA LIGHTS		120	No	No
252	FORMAN CIGARETTES		120	No	No
253	GALAXY DUAL CAPSULE LIGHTS		120	No	No
254	GLORY CHANGE		140	No	No
255	GM CLASSIC RED		150	No	No
256	GM SILVER		100	No	No
257	GOLD CITY KING SIZE		160	No	No
258	GOLD FLAKE		100	No	No
259	GOLD FLAME		150	No	No
260	GOLD MONT		150	No	No
261	GOLD PIN		110	No	No
262	GOLD SEAL FULL FLAVOUR		100	No	No
263	GOLD SEAL LIGHTS		120	No	No
264	GOLD SEAL SWITCH ON	220	No	No	
265	GOLD STREET CLASSIC	150	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
266	GOLDEN DEER KING SIZE	Not Printed	180	No	No
267	GOLDEN DEER LIGHTS		150	No	No
268	GOLDENLEAF		160	No	No
269	GOLDMANS FULL FLAVOUR		120	No	No
270	GT SMART		140	No	No
271	GUDANG GRAM INTERNATIONAL		120	No	No
272	H&P BLACK		120	No	No
273	H&P FULL FLAVOUR RED		130	No	No
274	H&P LIGHTS BLUE		150	No	No
275	HI LITE SPECIAL MILD		180	No	No
276	INHALE		110	No	No
277	JAISALMER		160	No	No
278	JUST BLACK		120	No	No
279	KENTUCKY SELECT		160	No	No
280	KINGDOM VIRGINIA WHITE		100	No	No
281	KINGSMAN LUXURY LIGHTS BLUE		100	No	No
282	KINGSMAN LUXURY LIGHTS RED		120	No	No
283	KINN LIGHTS		160	No	No
284	L&M RED LABEL		120	No	No
285	L&M BLUE LABEL		180	No	No
286	L&M LIGHTS	100	No	No	
287	LANDUS CHANGE	200	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
288	LAWRENCE CLASSIC	Not Printed	150	No	No
289	LEGATE PREMIUM		150	No	No
290	LONDON FILTER		150	No	No
291	MI AMERICAN BLEND RED		100	No	No
292	MI BLUE SPECIAL FILTER		150	No	No
293	MI RED		100	No	No
294	M7		160	No	No
295	M7 BLACK		150	No	No
296	MAC EXTRA FILTER		140	No	No
297	MANCHESTER SAPPHIRE BLUE		160	No	No
298	MAGIC		50	No	No
299	MANAGER FILTER KINGS		150	No	No
300	MANCHESTER BLUE		150	No	No
301	MANCHESTER CLASSIC GOLD		150	No	No
302	MANCHESTER EXTRA		150	No	No
303	MANCHESTER LIGHTS		150	No	No
304	MANCHESTER NANO BLACK		150	No	No
305	MANCHESTER QUEEN BLACK		150	No	No
306	MANCHESTER QUEEN BLUE		160	No	No
307	MANCHESTER QUEEN RUBY		150	No	No
308	MANCHESTER RED	170	No	No	
309	MANCHESTER ROYAL RED	170	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
310	MANCHESTER UNITED KINGDOM GREY	Not Printed	150	No	No
311	MARBLE		120	No	No
312	MARK ONE VIVID GOLD		110	No	No
313	MARLBORO GOLD		150	No	No
314	MARSHAL FULL FLAVOUR		130	No	No
315	MASTER RED EDITION		180	No	No
316	MEHR ORIGINAL GOLD		150	No	No
317	MEMPHIS		130	No	No
318	MIKADO BLACK		120	No	No
319	MIKADO SPECIAL LIGHTS		100	No	No
320	MILANO FILTER		220	No	No
321	MILANO FURIOUS RED		180	No	No
322	MILANO GENEVA		140	No	No
323	MILANO GOLD		160	No	No
324	MILANO KINGS EDITION BLUE		170	No	No
325	MILANO KINGS EDITION GREEN		150	No	No
326	MILANO KINGS EDITION GREY		170	No	No
327	MILANO KINGS EDITION RED		150	No	No
328	MILANO KINGS EDITION WHITE		220	No	No
329	MILANO KINGS RANDOM		300	No	No
330	MILANO NIGHT BLINKS		130	No	No
331	MILANO PARIS	110	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
332	MILANO SKY LINE	Not Printed	130	No	No
333	MILANO SUPERSLIMS GREEN		150	No	No
334	MILANO TECH LOCK		150	No	No
335	MILANO URBAN MIRAGE		150	No	No
336	MILANO VARIANCE		250	No	No
337	MODERN CIGARETTES GOLD		150	No	No
338	MODERN CIGARETTES GREY		150	No	No
339	MODERN CIGARETTES RED		150	No	No
340	MODERN CIGARETTES SLIMS		150	No	No
341	MOHAWK FULL FLAVOUR		150	No	No
342	MOMENTO BLUE FIRE		140	No	No
343	MOMENTO INTENSE		140	No	No
344	MOND BLUEBERRY & MINT DUAL BRUST		150	No	No
345	MOND KINGS ELITE RED		150	No	No
346	MOND NANO		150	No	No
347	MOND QUEEN EDITION RED		150	No	No
348	MOND STRAWBERRY SUPER SLIMS		170	No	No
349	MOND SUPER SLIMS GREEN APPLIE		170	No	No
350	MOND SUPER SLIMS LEMON MINT		200	No	No
351	MOND SUPER SLIMS PAN		160	No	No
352	MOND SUPER SLIMS STRAWBERRY		150	No	No
353	MOND SUPER SLIMS SWEET MANGO		200	No	No

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
354	MOND SUPERSLIMS BLUE	Not Printed	150	No	No
355	MOND SUPERSLIMS CHERRY		150	No	No
356	MOND SUPERSLIMS CHOCOLATE		150	No	No
357	MONDS KING ELITE BLUE		150	No	No
358	MONTERO KING SIZE		180	No	No
359	NANO NAPOLI PINK		150	No	No
360	NASHVILLE BLUE		170	No	No
361	NASHVILLE DOUBLE BURST MINT BERRY		170	No	No
362	NASHVILLE RED		140	No	No
363	NATIVE FULL FLAVOUR		150	No	No
364	NAVY SPECIAL FILTER		100	No	No
365	NERO BLUE		150	No	No
366	NERO RED		150	No	No
367	NEW YORK KING SIZE		160	No	No
368	NZ 10		150	No	No
369	ORIGINAL MARLBORO GOLD		130	No	No
370	ORIS BLUE		160	No	No
371	ORIS BLUE QUEEN EDITION		170	No	No
372	ORIS RED QUEEN EDITION		170	No	No
373	ORIS SILVER QUEEN EDITION		170	No	No
374	ORIS SLIMS CHERRY	160	No	No	
375	ORIS SLIMS DOUBLE APPLE	160	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
376	ORIS SLIMS GOLD	Not Printed	160	No	No
377	ORIS SLIMS GRAPE		160	No	No
378	ORIS SLIMS LIGHTS		160	No	No
379	ORIS SLIMS MENTHOL		160	No	No
380	ORIS SLIMS ORANGE		140	No	No
381	ORIS XPLORE GREEN		150	No	No
382	OSCAR BLUE		130	No	No
383	PACIFIC BLUE		160	No	No
384	PALL MALL II		150	No	No
385	PARIS		120	No	No
386	PARK ROYAL		90	No	No
387	PEACE ORIS		100	No	No
388	PECT		110	No	No
389	PEEL KYOHO		150	No	No
390	PEEL LEMON		150	No	No
391	PEEL ORANGE		150	No	No
392	PINE LIGHTS		180	No	No
393	PINE PREMIUM MENTHOL		180	No	No
394	PLATINUM SEVEN BLUE QUEEN		140	No	No
395	PLATINUM SEVEN BLUE PREMIUM BLEND		170	No	No
396	PLATINUM SEVEN BLACK NANO	150	No	No	
397	PLATINUM SEVEN BLACK QUEEN	110	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT



Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
398	PLATINUM SEVEN CHERRY	Not Printed	150	No	No
399	PLATINUM SEVEN COOL		120	No	No
400	PLATINUM SEVEN DENIM BLUE		150	No	No
401	PLATINUM SEVEN GOLD		120	No	No
402	PLATINUM SEVEN GUM MINT		200	No	No
403	PLATINUM SEVEN KING SIZE BLUE EDITION		170	No	No
404	PLATINUM SEVEN KING SIZE WHITE SPECIAL EDITION		150	No	No
405	PLATINUM SEVEN MELBOURNE		150	No	No
406	PLATINUM SEVEN SILVER QUEEN		140	No	No
407	PLATINUM SEVEN SLIMS DOUBLE APPLE		150	No	No
408	PLATINUM SEVEN SLIMS LIGHTS BLUE		200	No	No
409	PLATINUM SEVEN SLIMS MENTHOL		200	No	No
410	PLATINUM SEVEN SLIMS STRAWBERRY		140	No	No
411	PLATINUM SEVEN VALENCIA		120	No	No
412	PLATINUM SEVEN WHITE QUEEN		140	No	No
413	PLATINUM SEVEN X FUSION		120	No	No
414	PLEASURE LIGHTS		100	No	No
415	PRESIDENT FULL FLAVOUR		100	No	No
416	PRINCE		150	No	No
417	RAISON		100	No	No
418	RAQUEL GOLD CLASSIC	120	No	No	
419	RED RESPECT	150	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
420	REDS VIRGINIA	Not Printed	140	No	No
421	REGINA RED		120	No	No
422	REINO CLASSIC SLIMS		150	No	No
423	RELAX SEVEN BLUE		100	No	No
424	RELAX SEVEN RED		150	No	No
425	ROBIN BLUE		150	No	No
426	ROBIN CLASSIC		150	No	No
427	ROBIN NANO		150	No	No
428	ROBIN SUPERSLIMS BUBBLEGUM MINT		150	No	No
429	ROYAL ASCOT		150	No	No
430	RUBY SUPER SLIMS		70	No	No
431	RUMBA RED		100	No	No
432	SAFARI STAR		100	No	No
433	SAN MARTIN RED		140	No	No
434	SELFIE		140	No	No
435	SENATOR CLASSIC		150	No	No
436	SENATOR RICH AROMA NANO		150	No	No
437	SEVEN STARS		170	No	No
438	SIERRA GOLD RED		240	No	No
439	SIR KING SIZE		140	No	No
440	SOVEREIGN CLASSIC		150	No	No
441	SUPER MENTHOL	150	No	No	

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
442	SWISSE BLACK	Not Printed	100	No	No
443	TETON BLUE KINGS		200	No	No
444	TETON RED KINGS		150	No	No
445	TEXAS 5		140	No	No
446	TEXAS 5 LIGHTS		150	No	No
447	THREE STARS GOLD		140	No	No
448	THREE STARS LIGHTS		100	No	No
449	THREE STARS MENTOL		160	No	No
450	THREE STARS RED		100	No	No
451	TIME BLUE		120	No	No
452	TIR		150	No	No
453	TOP MOUNTAIN BLUE		170	No	No
454	TOP MOUNTAIN RED		120	No	No
455	TRADITION GOLD		140	No	No
456	TRADITION WHITE		100	No	No
457	TRUMP		100	No	No
458	TUTION SIGNATURE COLLECTION BLUE		130	No	No
459	TUTION SIGNATURE COLLECTION GOLD		130	No	No
460	ULTIMA KING SIZE FILTER		120	No	No
461	ULTIMA LIGHTS		150	No	No
462	VESS AMERICAN BLEND		160	No	No
463	VESS CRUSH DOUBLE		150	No	No

# CIGARETTE BRAND COMPLIANCE ASSESSMENT

Sr #	Brand Name	Printed Price	Average Selling Price	Track and Trace Stamp	Graphical Health Warning
464	VESS CRUSH DOUBLE APPLE MINT	Not Printed	170	No	No
465	VESS FINE BLEND		150	No	No
466	VIGOR		120	No	No
467	VOICE SLIMS FRUIT GREEN APPLE		140	No	No
468	WILD HORSE RED KINGS BOX		120	No	No
469	WIN		140	No	No
470	XMAN BLUE		130	No	No
471	XMAN RED		150	No	No
472	ZEST BLUE		150	No	No
473	ZEST BLUE SLIM		150	No	No
474	ZEST MENTHOL		150	No	No
475	ZEST SLIGHT BOX RED		130	No	No
476	ZON KING INTERNATIONAL		150	No	No
477	ZUMERRET BLUE		130	No	No

# SAMPLE TABLE

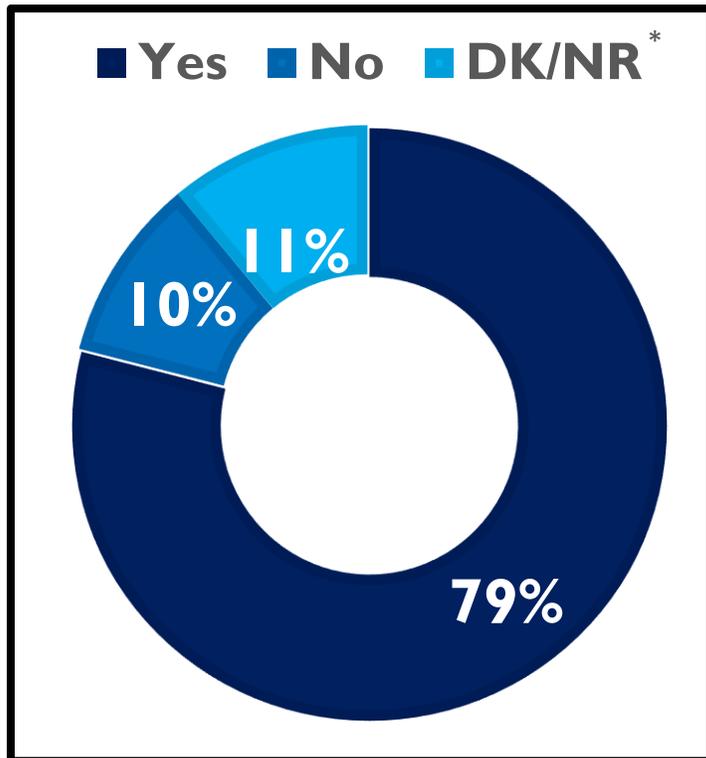
<b>Sr #</b>	<b>City Name</b>	<b>Locations/Markets</b>	<b>Number of Outlets</b>
1	Lahore	Shahdrah, Mughalpura	80
2	Karachi	Sohrab goth, Metroville/Orangi Town	80
3	Islamabad & Rawalpindi	Barakahu, Tench Bhata Market	80
4	Peshawar	Bara Road, Androon Nothia	80
5	Quetta	Masjid Road – Main City, New Adda – Main City	80
6	Faisalabad	Khurrian Wala, WarisPura, Ghanta Ghar	120
7	Multan	Vehari Chowk, Chowk Kumharan	80
8	Sukkur	Military Road, 100 Feet Road, Shahi Bazar	120
9	Gujranwala	Gondlawala Adda, Pasrur Road	80
10	Sialkot	Lari Adda, China Chowk/Defense Road	80
11	Kasur	Kot Radha Kishan, Khuddian, Chunian, Bhai Phero	120

# SAMPLE TABLE

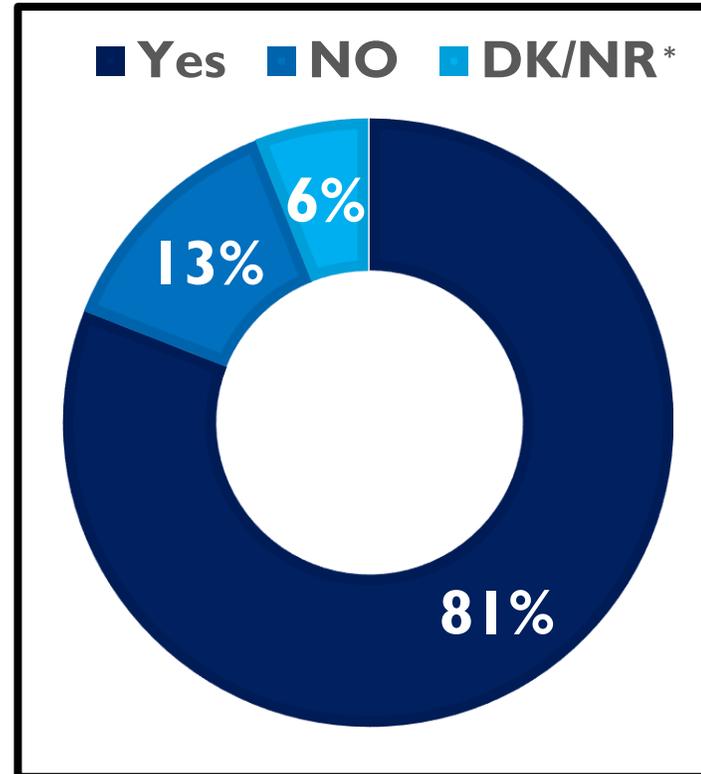
<b>Sr #</b>	<b>City Name</b>	<b>Locations/Markets</b>	<b>Number of Outlets</b>
12	Bahawalnagar	Madrassa, Dahranwala	80
13	Bahawalpur	Hasilpur	40
14	Muzaffargarh	Khan Garh, Shah Jamal, Baseera	120
15	Khairpur	Luqman Phatak	40
16	Matiari	Odero Stration	40
17	Sanghar	Dalor Mori	40
18	Umerkot	Thar Bazar, Bus Stand	80
19	Hyderabad	Saddar	40
<b>TOTAL</b>			<b>1520</b>

# TTS AWARENESS AMONGST RETAILERS

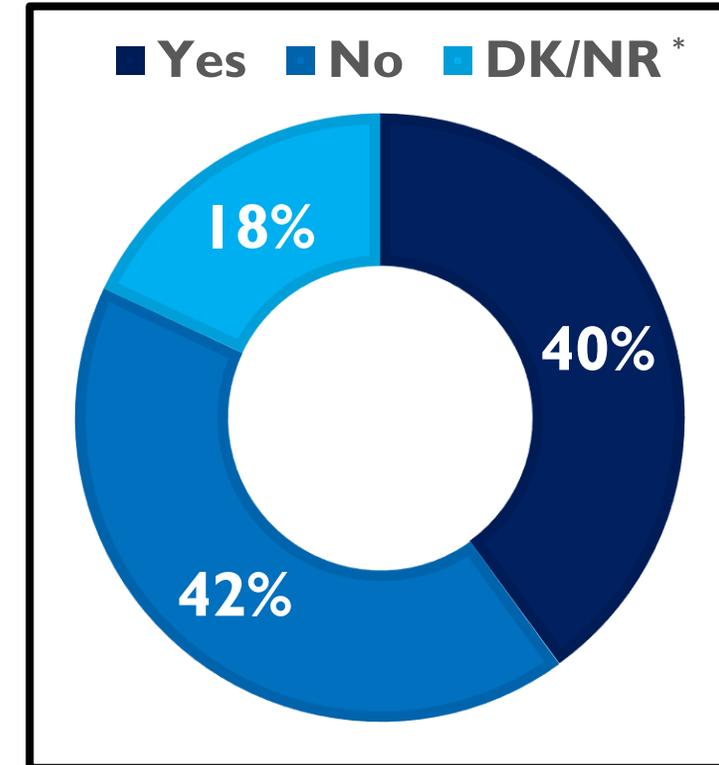
Awareness of Difference b/w Compliant and Non-compliant Brands



Awareness of TTS



Impact on sales after TTS Implementation



Despite retailer level awareness, **only 40% retailers said they faced issues in selling non-compliant brands** to consumers showcasing lack of point-of-sale enforcement

# Thank You!

## IPOR

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