

Japan Tobacco Inc and Japan Tobacco International

Overview

The tobacco industry is one of the most profitable and deadly industries in the world with the global cigarette business valued at \$559.9 billion USD.¹ The World Health Organization estimates that the tobacco epidemic could kill one billion people during the 21st century, with the majority of those deaths occurring in developing countries.² The international tobacco market is dominated by five major transnational tobacco companies (TTC), which sell their lethal products in markets around the world: China National Tobacco Company (CNTC), Philip Morris International (PMI), British American Tobacco (BAT), Japan Tobacco Inc (JT), and Imperial Tobacco.

Japan Tobacco Inc (JT) is a Japanese tobacco company that is 50 percent owned by the Japanese government.³ JT's headquarters are in Tokyo, Japan.⁴ Besides tobacco, JT also has interests in pharmaceuticals, food and other business sectors. However, the driving force behind JT's profits and growth is its domestic and international tobacco sales.⁵ JT manufactures, markets, and sells its products internationally through Japan Tobacco International (JTI). JTI is headquartered in Geneva, Switzerland.⁴ JTI was originally established in 1999 after JT acquired R.J. Reynolds' international tobacco sector for \$8 billion USD. In 2007, JTI's operations were expanded through the acquisition of Gallaher Group.⁶

JTI operates in 120 countries and controlled 10.4% of the global cigarette market in 2009.⁷ JTI's international selling brands included *Winston*, *Mild Seven*, and *Camel*. In addition to cigarettes, JTI also produces other tobacco products such as *Camel Snus*, *Hamlet Cigars*, and *Amber Leaf*, a roll-your-own tobacco product.⁸

Domestic and International Profitability

JT is the third most profitable publicly traded tobacco company following PMI and BAT.⁷ JT's total net profits for March 2009-March 2010 were 138 billion Yen (\$1.67 billion USD), driven mainly by a combination of international and domestic cigarette sales. Despite its large profits for the 2009 fiscal year, JT's domestic cigarette sales have been on the decline. In order to offset decreased domestic profits, JT continues to aggressively expand its international tobacco business through JTI. In 2009, JTI sales surpassed the domestic cigarette business and became JT's main source of revenue.⁹ During 2008, JTI was the first or second leading tobacco business in eleven major markets, including Russia, Ukraine, Japan and the United Kingdom.¹⁰

JT Domestic and International Growth 2009-10*⁵

Sector	Volume Sales 2010 (billion sticks)	Change in Volume Sales from 2008-09	Net Sales excluding excise taxes (billion USD)	Operating income** (billion USD)
Domestic Sales	151.9	-5.0%	32.7	2.2
International Sales	434.9	-2.5%	28.3	1.2
Total	586.8	-3.1%	61.0	3.4

* JT's fiscal year runs March to March

**Operating income is defined as earnings before interest, taxes, depreciation and amortization

Cigarette Volumes by Region

Market research firm, Euromonitor International, notes that the demand for tobacco products domestically in Japan is on the decline as a result of several factors including a more health conscious public, increased smoke-free regulations, and an aging Japanese population. These reasons, as well as the global economic downturn, can also be applied to many other overseas markets and attribute to the overall decline in sales volume internationally.¹¹

The European Union (EU) and the Commonwealth of Independent States (CIS)[‡] are two regions that are important contributors to the company's financial strength. Of the top 18 international markets where JTI operates, eight are in Western Europe. Sixteen percent of JTI's operating income is from the United Kingdom, while the rest of Europe adds another 22 percent to its operating income. As such, a total of 38 percent of JTI's operating income comes from the EU.⁵

Regional Growth in 2008-2009⁵

JTI Region	Volume 2009 (billion sticks)	Year-on-year change
South and West Europe	64.5	0.4%
North and Central Europe	47.5	7.6%
CIS	214.6	-2.4%
Rest of the World	108.4	-8.0%

Presence in Emerging Markets

In 2009, 68 percent of JTI's volume sales came from emerging markets. Emerging markets in the CIS region produce close to half of the company's international volume sales (49.3%).⁵ JTI's success in the CIS region is due mainly to acquisitions and to its aggressive marketing of the *Winston* brand.⁹ In Russia, JTI has increased its operating profit over the last few years through a mix of volume growth and the rising prices in cigarettes faster than in any other major tobacco-

[‡] CIS countries include Azerbaijan, Armenia, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Uzbekistan and Ukraine.

consuming country.¹⁰ In 2011, JTI aims to expand its sales in the Middle East, North Africa and Russia.¹²

JTI's Key Market Growth, 2009⁵

	Market Share 2008	Market Share 2009	% change
Italy	17.1%	18.5%	1.4
Spain	20.5%	20.6%	0.1
France	14.2%	14.8%	0.6
UK	39.1%	40.4%	1.3
Russia*	35.7%	36.8%	1.1
Turkey*	17.0%	18.8%	1.8
Taiwan*	38.7%	38.0%	-0.7

*emerging markets

Global Branding Strategy

International brands increase a tobacco company's sales volume globally because of their appeal to younger smokers. As one tobacco industry strategist reported, it is important for international brands to win "high penetration among young adult smokers, as success in this segment confirms a brand's image as 'younger' and ensures longer-term usage of the brand by those consumers."¹³ JTI focuses heavily on promoting international brands globally. For example, after acquiring RJ Reynolds' international tobacco business in 1999, JTI significantly changed the packaging of *Camel* cigarettes. The goal of the redesign was to make the packaging more consistent across markets to increase customer loyalty and make the brand more recognizable globally.¹⁴



As a result of the acquisition of Gallaher in 2007, JTI more than doubled the number of global cigarette brands from three to eight by adding *Benson & Hedges*, *Glamour*, *LD*, *Silk Cut* and *Sobranie* to the company's brand portfolio that already included *Winston* and *Camel* (from the RJ Reynolds international tobacco arm acquisition), and *Mild Seven* (an original JT brand). These brands combined comprise 50% of JTI's global tobacco sales by volume.¹⁰

JTI's global positioning is based mainly on what the company classifies as its global drive brands, *Winston* and *Camel*. *Winston* is the second most popular cigarette brand sold globally behind only PMI's *Marlboro*.¹ *Winston* is also the market leader in Eastern Europe and the second most popular brand in Western Europe. *Camel* also has a strong presence in Western

Europe and an emerging presence in Latin America.⁵ JT's *Mild Seven* – sold in Japan by JT and internationally by JTI - is another strong brand for the company. The brand is the third largest globally with sales concentrated in Asia.⁹ In the coming years, JTI plans to spend \$100 million USD a year on marketing its global flagship brands to continue expanding its international customer base.⁹

Marketing Techniques

The redesigning and re-marketing of current products occurs in other countries, while the introduction of new products primarily takes place in Japan. This is a way for JT to test new products in its domestic market, while at the same time, redesign cigarette packaging and marketing across the globe to keep its branding consistent and new.¹⁵

International Tactics



Point of sale display in Russia

JT's profits depend greatly on the sale of tobacco products internationally. The company under its JTI operations is apt at marketing its products globally by using many different tactics to promote its brands. Many of the marketing techniques created and perfected by JT/JTI and other tobacco companies in developed markets are now being used in emerging markets where tobacco control regulations are weak.

Recycled marketing tactics include the fraudulent campaign of “low-tar” tobacco products from the U.S. and other developed markets. In 2006, a U.S. federal judge found that tobacco companies knew for decades that there were no health benefits from smoking “low-tar” cigarettes, yet they continued to aggressively and falsely market such products to reassure smokers that their “low-tar” or “mild” cigarettes are less harmful than higher tar.¹⁶ Currently, JT/JTI profits from products that deceptively claim to be milder in taste and lower in tar levels both internationally and domestically.

- Internationally, JTI continues to focus on its *Mild Seven* brand especially in Asian markets. Despite being banned in some countries due to laws that prohibit the use of misleading descriptors like “mild,” *Mild Seven* is still uniquely positioned in some markets that ban misleading descriptors from cigarette packaging. In Thailand, for example, *Mild Seven* cigarettes were exempt from the 2006 misleading descriptor ban because the law covers only “sub branding” words and not the brand name.¹⁷ Taking advantage of this loophole and *Mild Seven*'s strong positioning, JTI launched two new variants of the brand in Asia.¹⁸



- *Mild Seven LSS* (less smoke smell) cigarettes, a brand that claims to reduce tobacco smoke odor. JTI plans on making the brand available in all international airports in the Asian Pacific region.
- The special edition *Mild Seven Equilizer* side-slidepack which featured “iconic landmarks of cities such as Tokyo, Taipei, Seoul, Kuala Lumpur, Singapore and New York.”
- JTI expanded its *Winston* brand with the launch of *Winston XS Blue* and *Winston XS Silver* with a new charcoal filter. The use of images of filters and the term “charcoal filter” have been found to mislead consumers to believe that the new technology makes these products less harmful than other products.¹⁹ The mass marketing campaign to launch *Winston XS* in Russia included point-of-sale displays, print ads and online promotions.²⁰



JTI also uses the same aggressive marketing strategies to promote tobacco use in developed markets to attract women, urban and youth smokers in emerging markets where the company operates.

Marketing to Women

- In an attempt to take advantage of growing female smoker populations, JTI launched the *Glamour* brand. *Glamour* cigarettes are a line of super-slim cigarettes launched first in Russia, Ukraine, and Kazakhstan. This product was introduced as a competitor to BAT’s popular *Vogue* cigarettes.²¹ *Glamour* cigarettes are clearly targeted towards women, as shown in the use of pink and feminine graphics.²²



Marketing to Urban Elite

- In November 2009, JTI launched a new line of *Sobranie* cigarettes in Russia. The sleek packaging is designed to “highlight the premium modern positioning” of the brand. *Sobranie Black*, *Blue*, and *Gold* air-coal filters and the packaging’s international feel are attractive to up and coming urban adults.²³



Marketing to Young Adults

JTI uses exclusive music events, promotional giveaways and brand stretching to make its tobacco products more attractive to younger demographics.

- Urban Wave music events held in many of JTI's target markets such as Russia, Ukraine, Turkey, Mexico and South Africa are glamorous parties that feature popular DJs and attract thousands of attendees. Events are heavily branded by *Camel* and promotional booths are set up at the events to sell products and to collect consumer information.²⁴⁻²⁶
- JTI also uses its *Camel* brand to sell a men's clothing line called Camel Active. This clothing line attracts young, adventurous men to wear clothing that has the *Camel* name on it.²⁷



Domestic Tactics

Cigarette sales in Japan are declining.²⁸ Tobacco control laws such as increases in cigarette taxes as well as an increase in consumer health consciousness have contributed largely to the decline in volume sales. In order to protect its leading market share domestically, JT has revamped its leading brands, shifted the company's focus to lower tar products, and launched new and innovative products.⁹ JT's marketing strategies domestically include:

- Shifting sales and marketing from vending machines to convenience stores⁹- In 2008, Japan implemented the TAPSO vending machine system which required that people purchasing cigarettes from vending machines have identification cards verifying age.²⁹ After implementation, vending machine sales dropped from accounting for 44 percent of cigarette sales in Japan to 25 percent.¹¹ With the shift in purchasing behavior away from vending machines to convenience stores, JT has shifted to focusing marketing and promotions at the point-of-sale in Japanese stores.²⁸
- Revamping of market leader, *Mild Seven*- JT used the October 2010 tobacco tax increase as an opportunity to re-launch its most popular brand with new and sleeker packaging.³⁰ The revamp of *Mild Seven* was coupled with an increase in sale price designed to offset the more than 30 percent tax increase.¹¹ *Mild Seven's* new look, which was rolled out in November 2010, is designed to make the brand more attractive to consumers and



encourage them to buy the higher priced cigarettes.³¹

- Launching new variants to meet the demand for menthol products – In 2009, menthol cigarettes accounted for 21 percent of cigarette sales in Japan.²⁸ In 2009 and 2010 JT launched at least four different menthol cigarettes variants including *Pianissimo Lucia Menthol*, a citrus menthol brand designed to appeal to women.³²
- Marketing filter technologies and so-called low-tar products to appeal to health conscience consumers- With an increasingly health conscious population that is worried about the harmful effects of tobacco, JT is capitalizing on marketing new filter technologies and lower tar products domestically. Recent launches include *Mild Seven Impact One Menthol* which includes a unique filter containing a menthol flavor thread in the 1mg-tar cigarette.³¹ Another innovative filter by JT is found in *Seven Stars Black Charcoal Menthol* launched at the end of 2009. The new charcoal filter “utilizes a special membrane technology that inhibits the menthol component of cigarettes from being absorbed before being smoked” providing for a stronger menthol flavor.³³



Other Tobacco Products

The most prominent non-cigarette product launch by JT in 2010 was a smokeless tobacco product, *Zerostyle Mint*, released in Tokyo. *Zerostyle Mint* is shaped like a cigarette, has a replaceable cartridge that holds tobacco leaves, a mouthpiece, and detachable cap. The consumer inhales from the cartridge containing the tobacco and menthol.³⁴ JT claims that *Zerostyle Mint* will “help customers enrich their life with tobacco.”¹⁵ The new smokeless product will also allow customers to use tobacco where smoking bans are being implemented. For example, Japan Airlines and commuter train companies have said that *Zerostyle Mint* can be used while on board because it does not emit any smoke.⁹ The launch of *Zerostyle Mint* is the first example of a multinational tobacco company smokeless cigarette.⁹ *Zerostyle Mint* differs from an electronic cigarette because it actually contains tobacco and the cigarette itself is disposable.³⁵ *Zerostyle Mint* is currently only available in Japan.

Internationally, JTI launched the smokeless tobacco product, *Camel Snus*, in 2009 in the Swedish market. JTI also sells roll-your-own tobacco products including *Old Holborn* which is a top five brand in the UK and leads the roll-your-own tobacco category in Greece.³⁶

Corporate Social Responsibility

To increase goodwill among policymakers and the public and to counter tobacco control efforts, JT and JTI participate in a wide range of “community investment” initiatives across the globe. The tobacco company engages in so-called socially responsible activities while simultaneously manufacturing a product that is responsible for disease, disability and ultimately death of its

customers. This is a tactic to increase positive public opinion by distracting the consumer from the negativity that is caused by its products.

One way that JT engages in corporate social responsibility (CSR) is by promoting ineffective youth prevention campaigns. In Japan the company created the Youth Smoking Prevention Council and rolled out an educational campaign using newspaper advertisements to target to youth specifically.³⁷ However, industry-sponsored youth prevention programs have been proven to be ineffective at reducing youth tobacco use, and they may even encourage youth to smoke.³⁸⁻⁴⁰ When compared with public health programs, industry-sponsored prevention programs are less appealing and less convincing to youth.³⁸

Internationally, JTI attempts to influence policy makers and public perception by promoting different CSR activities to counteract its bad reputation. For example, in Africa, JTI focuses on reforestation in Malawi and Tanzania- two of the leading tobacco leaf producing countries where tobacco leaf production is responsible for a large portion of deforestation.⁴¹ JTI also supports the Eliminating of Child Labor in Tobacco-growing (ECLT) Foundation in Africa, an organization founded by BAT as a CSR program in 2000.³⁷ According to a 2006 study, the ECLTs has not been effective in dealing with the issue of child labor on tobacco farms in Africa.⁴²

Additionally, in 2001, JTI found the JTI Foundation based in Switzerland. The main function of the foundation is to provide disaster relief around the world by partnering with local organizations in the affected region.⁴³ While the JTI Foundation's website and branding is not similar to either JTI or JT, the company still benefits greatly from name recognition. The JTI Foundation and other CSR activities are tactics used by JT/JTI to present itself to policymakers as a responsible company and not just one associated with the sale of deadly products for profit.

Future Outlook of JT/JTI

There are several events that may affect consumption levels of JT's tobacco products in the coming years. Domestically, JT's main concern is the 2010 tax increase. Traditionally, tax increases in Japan have been implemented slowly as a result of the 50 percent government ownership of JT. However, beginning October 1, 2010, the average price of a pack of 20 cigarettes increased by 33 percent to 400 Yen (\$4.75 USD).⁴⁴ A second concern for JT is that cigarette consumption is expected to decline in the coming years in Japan and globally. However, it is predicted that overall sales will not be affected due to growing populations.⁹

While JT's domestic sales volumes are declining, the company is well positioned to increase sales internationally through JTI, particularly in emerging markets. The acquisitions of Gallaher and RJ Reynolds's international have played a large role in JTI's international growth. The acquisitions have also given the company more control over its pricing, which in the long run, will increase the company's profit margins regardless of declining consumption in some markets.⁹ The lack of effective regulations on advertising and marketing, coupled with the lack

of effective smoking and cigarette regulations in some countries, has allowed JT to constantly evolve its products internationally. In markets where the company is seeing declines and increased regulation, JTI continues to circumvent regulations by creating new products and ways of marketing existing products to avoid any major decline in consumption or profits. As governments continue to increase regulation of tobacco consumption and marketing, JT and JTI will only continue to respond in ways that continue to deceive and mislead consumers. Strong tobacco control policies will be critical to prevent the countless future deaths caused by JT's expansion globally.

Appendix A: Relevant Websites

General JTI website: <http://www.jti.com/>

Find more information about JTI's global performance from the company's annual report:
<http://www.jti.com/documents/annualreports/Annualreport2010.pdf>

JTI Management: <http://www.jti.com/About/management>

JTI Headquarters:

1, rue de la Gabelle
Geneva 26, GE 1211
Switzerland

JT Headquarters:

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Japan
Tel: +81 3 3582 3111
Fax: +81 3 5572 1441

Additional locations and contact information for JTI offices are listed by country:
http://www.jti.com/About/about_locations

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