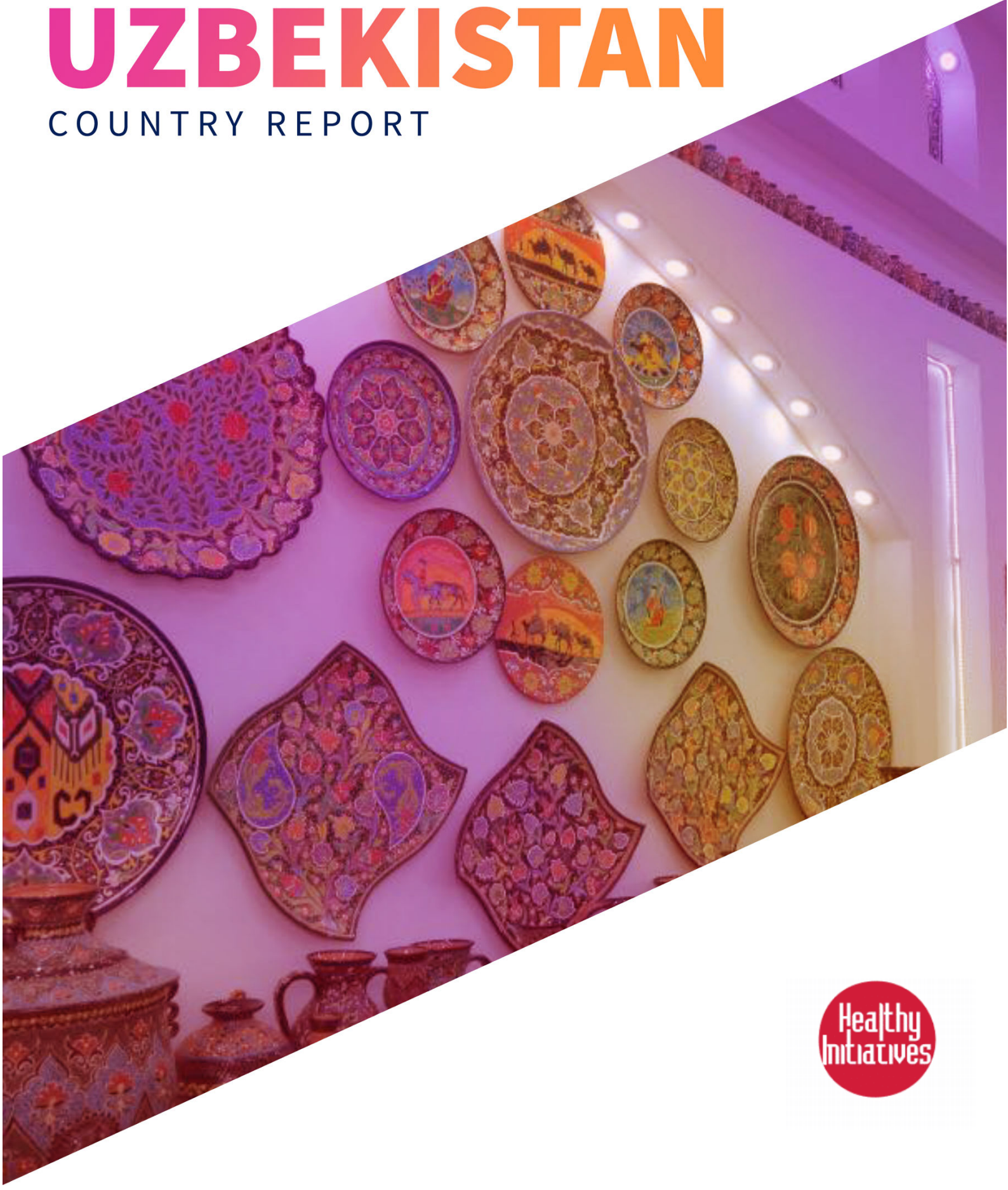


DECEMBER 2021

UZBEKISTAN

COUNTRY REPORT





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Introduction

Uzbekistan is the most densely populated country in Central Asia, with a population of about 33 million. Uzbekistan shares borders with Kazakhstan, Tajikistan, Kyrgyzstan, Turkmenistan and Afghanistan. According to World Bank estimates, GDP per capita by 2019 was USD 1,7821, which is within an average range for Central Asia countries.

Over the last decade, Uzbekistan has been implementing a targeted policy to control the consumption of tobacco products. The geopolitical background of this policy may to some extent be interpreted by the fact that Uzbekistan has expressed its intention to join the Eurasian Economic Union (EAEU). In May 2020, the government of Uzbekistan and both chambers of parliament approved the country's accession to this organization as an observer state. Although this decision is motivated largely by economic interests, one can assume that the policy aimed at curbing the consumption of tobacco and nicotine-containing products in Uzbekistan will further develop in the direction of consolidation with similar efforts of the EAEC member states.

Table 1 provides an overview of this country and its economy.

Table 1. Uzbekistan at a glance, 2018-2019

Area	0,4 mln- Km2
Population	33,6 mln.
Life expectancy at birth	71.6
Official language	Uzbek
Capital	Tashkent
Currency (Code)	Uzbekistani so
GDP, current US \$	57 9b1n.
GDP per capita, current US \$	1724.8
Unemployment, total, % of total labor force (national estimate)	9.3
Ease of doing business ranking	69
Total tax and contribution rate (% of profit)	31.6
Poverty headcount ratio at \$3.20 a day, % of population (2011 PPP) in 2017	

Source: World Bank

Uzbekistan is not a WTO member and has for many years been implementing a policy of protectionism with regard to production facilities located in the country, including the production of cigarettes.

Since 2019, the country has been implementing a Campaign for Tobacco-Free Kids (CTFK) project to facilitate the development of legislation compliant with FCTC requirements. In 2012, Uzbekistan ratified the World Health Organization Framework Convention on Tobacco Control (WHO FCTC), but made no steps to decrease smoking prevalence.

¹ World Development Indicators database, World Bank, 1 July 2020

To date, only a few studies on tobacco use prevalence have been conducted in Uzbekistan. The most recent was the STEPS survey conducted by the World Health Organization in 2014. Euromonitor provides more recent data, although it does not disclose its methodology. Estimates of prevalence vary considerably but coincide with the fact that the smoking prevalence in the country is predominantly male (23.3% of men against 1.3% of women). In recent years, there has been a significant increase in the number of smokers among women in urban areas. In the past, traditional cultural factors forced female smokers to hide this habit from others, however this is no longer the case.

One peculiarity of tobacco consumption in Uzbekistan is the high level of consumption of a homemade smokeless tobacco product called nasvai. Uzbekistan has the highest prevalence of this product among Central Asian countries - 12% use among adults, which is comparable to the prevalence of smoking. The production and composition of nasvai tobacco is not regulated, and sales are carried out through illicit trade channels.

Cigarettes and nasvai are the main source of nicotine for consumers. Cigarette production in the country is represented by a subsidiary of BAT, which has control of just under 90% of the market. Later market entrants JTI and PMI operate on a contractual production basis and do not have their own factories.

There is virtually no system in place in the country for providing support to tobacco users who intend to quit. Of great concern is the limited access to up-to-date, reliable data to analyze both the economic and social aspects of the topic in order to develop effective policies aimed at reducing the use of tobacco products.

HRPs are not popular yet in the country and target people with high incomes.

Smoking Prevalence Rates

According to WHO² estimates, Uzbekistan has a lower prevalence of smoking compared to other countries, both in terms of the average number of cigarettes smoked per day and the total percentage of smokers. In Uzbekistan about 14.4% of the adult population smokes cigarettes (STEPS 2014), versus 17% in Kazakhstan, over 27% in Russia, 23% in Ukraine, and 25% in Georgia.

The official statistics of Uzbekistan do not provide information related to the consumption of tobacco and nicotine products. Cigarettes are not included in the consumer basket of goods, the product prices analyzed by authorities in order to assess the consumer price index. Therefore, the results of the WHO STEPS survey (last conducted in Uzbekistan in 2014), along with Euromonitor data, are among the few sources of data available to estimate the level of smoking prevalence in Uzbekistan.

The key purpose of the STEPS³ survey in 2014 was to study the prevalence of the main non-communicable disease risk factors among the total population aged 18-64 years. In addition to the core modules of the questionnaire, and following a proposal by the survey's technical team, a panel of Ministry of Health experts decided on additional modules, including those on public anti-tobacco policies. In this context, respondents were carefully surveyed about their current and previous use of various tobacco types (both smoked and smokeless), and the duration and frequency of tobacco use, as well as secondary exposure to tobacco smoke.

Table 2 presents the findings of surveys on smoking prevalence among adults, including its gender breakdown.

² WHO Report on the global tobacco epidemic, 2019

³ Prevalence of non-communicable disease risk factors in Uzbekistan (STEPS, WHO, 2014)

Table 2. Smoking prevalence indicators (in %)

Indicator/Data source	Sex	2014	2015	2016	2017	2018	2019
Age-standardized prevalence estimates for daily tobacco smoking among persons aged 15 and above / WHO, Global Tobacco Epidemic report and Global report on trends in prevalence of tobacco use 2000-2025	Both sexes		9.7		12.5	12.3	
	Males		18.9		23.7	23.3	
	Females		1.0		1.3	1.3	
Crude prevalence estimates for current tobacco smoking among persons aged 18-64/ STEPS survey	Both sexes	14.4					
	Males	26.8					
	Females	1.4					
Current daily tobacco use among ages 18-64/ STEPS survey	Both sexes	17.6					
	Males	33.4					
	Females	1.1					
Number of adult smokers in % / Euromonitor International	Males	19.6	19.6	19.6	19.7	19.9	20.2
	Females	3.0	3.0	2.9	3.0	3.1	3.1
	Both sexes	11.1	11.1	11.1	11.2	11.3	115.0

Source: WHO reports on the global tobacco epidemic, WHO Global report on trends in prevalence of tobacco use 2000-2025, STEPS, Euromonitor International

The indicators used in the table refer to the following:

- “Tobacco smoking” means smoking any form of tobacco, including cigarettes, cigars, pipe, hookah, shisha, water-pipe etc., and excludes smokeless tobacco.
- “Tobacco use” means using tobacco in any form, including all types of smoked and smokeless tobacco.
- Daily tobacco smoking/use: “daily” means smoking every day at the time of the survey.

Table 3 summarizes smokeless tobacco prevalence figures from 2013 (GYTS) and 2014 (STEPS) survey data, where “smokeless tobacco use” means using any form of smokeless tobacco, including chewing, sniffing, or placing the product inside the cheek.

Table 3. Smoking prevalence indicators for smokeless tobacco products (in %)

Indicator/ Data source	Sex	2013	2014	2015	2016	2017	2018
Current smokeless tobacco use prevalence among persons aged 18-64/ STEPS	Both		12.0				
	Males		23.2				
	Females		0.2				
Current smokeless tobacco use prevalence among persons aged 13-15 / GYTS	Both sexes	6.0					
	Males	5.8					
	Females	6.3					

Source: WHO reports on the global tobacco epidemic, STEPS, GYTS

Nasvai is a particular concern for smokeless tobacco use in this region, which can be considered a dangerous form of smokeless tobacco. Nasvai is a smokeless tobacco mixture made of tobacco with an added alkaline component and other ingredients, consumed by being stuffed in the floor of the mouth between the lips and gums. It is a traditional tobacco product amateurishly produced from local raw materials (including tobacco leaf, cottonseed oil, and ash), and for many years across the countries of Central Asia it has been consumed mostly by men.

However, its production in Central Asian countries is not controlled, and its composition is unregulated. Nasvai is distributed through illicit trade; its price is several times lower than the price of the cheapest cigarette pack, making it highly available to virtually all segments of the population. As of April 2020, the price for a 50-gram

pack in a Tashkent market was 2,000 soums (about USD 0.2), more than 2.5 times lower than the price of the cheapest cigarettes.⁴

In September 2011, a survey was conducted on the behavior patterns of smokers in Uzbekistan⁵, which revealed that the share of nasvai consumers is 22% of the male population, mostly those living in rural areas. The 2014 STEPS survey indicates a smokeless tobacco prevalence rate of 23.2% among men and 0.2% among women. The data on the prevalence of this type of tobacco product among adolescents aged 13-15 is even more disturbing; 6.3% of girls and 5.8% of boys use smokeless tobacco⁶. These high rates of nasvai prevalence should be taken into consideration when developing national policies aimed at reducing the use of nasvai.

Strategy of Replacement in Central Asia (Uzbekistan, Tajikistan, Kyrgyzstan)

A common factor for tobacco consumption across this region of Central Asia is the high share of consumption of nasvai⁷. These three countries are all low-income.

(NOTE: as of 2018, Uzbekistan's population was 32.96 million people, with a Gross National Income per capita of USD \$2,020; Tajikistan's population was 9.10 million people, with a Gross National Income per capita of USD \$1,010; and Kyrgyzstan's population was 6.32 million people, with a Gross National Income per capita of USD \$1,220).

This region also has a minimal number of surveys or data on tobacco consumption prevalence. The only source of information on consumption is the data occasionally provided by the World Health Organization. None of these countries regularly analyze their tobacco consumption prevalence.

According to the World Health Organization's surveys, it is in Uzbekistan that nasvai is most popular, where 23% of adult men consume this tobacco product (STEPS 2014)⁸, which is higher than the rate of cigarette smoking among men at 19.6%⁹. A laboratory study of nasvai samples from Central Asia conducted by Stepanov Laboratory, Masonic Cancer Center, and the University of Minnesota pointed to a high level of nitrosamines as well as an extremely high level of pH¹⁰. "The nicotine content of nasvai is high and it has a pH level of around 10, optimizing the bioavailability of nicotine in its unprotonated form, which easily penetrates cell membranes in the mouth and thereby rapidly enters the bloodstream."

Two opposing strategies towards regulating nasvai are implemented within the process of promoting tobacco control efforts. In the Russian Federation, Article 19 of Federal Law No. 15-FZ "On protecting the health of citizens from the effects of second-hand tobacco smoke and the consequences of tobacco consumption" prohibits the wholesale and retail sale of nasvai. The ban of nasvai sales was adopted in 2013, and the ban on snus and other forms of sucking tobacco was imposed in late 2015. The Administrative Code establishes punishments for violations of these provisions of the Federal law. Chewing tobacco remains legal in the

⁴ As of April 2020, the retail price of the cheapest cigarettes in the ASTRA and Karvon market was 5,500 soums.

⁵ Gulnoza Usmanova, Yehuda Neumark, Mario Baras, Martin McKee, Patterns of adult tobacco use in Uzbekistan. https://www.researchgate.net/publication/51639839_Patterns_of_adult_tobacco_use_in_Uzbekistan

⁶ WHO Report on the global tobacco epidemic, 2017 https://www.who.int/tobacco/global_report/2017/en/

⁷ http://www.euro.who.int/__data/assets/pdf_file/0010/391762/Consumption-and-approaches-to-the-regulation-of-nasvai-in-CIS_EN.pdf?ua=1

⁸ https://www.who.int/tobacco/global_report/2017/appendix-xi/en/

⁹ WHO report on global tobacco epidemic https://www.who.int/tobacco/global_report/en/

¹⁰ <https://tobaccocontrol.bmj.com/content/26/3/355>

Russian Federation. When decisions to ban the turnover of smokeless tobacco products were passed, the efficiency of replacing snus consumption vs. cigarettes, the popularity of which has helped reduce the level of cigarette smoking in several countries, was not assessed. In spring 2020, a total ban on smokeless tobacco products was adopted in Kazakhstan, imitating the model of the Russian Federation.

In Tajikistan, a 2017 campaign seeking to adopt a tobacco control law resulted in certain regulations which did not ban the sales of nasvai, but imposed labeling requirements for this type of tobacco product, including messaging concerning harm from consumption. This was the first country in the region that approved a no ban strategy, but rather a regulatory one, by imposing minimum requirements for the product. No information about the rates of nasvai consumption could be found at the time this law was adopted in 2018, and this is still the case.

A similar strategy aimed at developing the legal framework for the production and sales of nasvai has been implemented in Kyrgyzstan as well (with a rate of consumption among men at 10.1%), where a comprehensive draft law setting requirements for tobacco products (including nasvai) and ENDS was first adopted in December 2019¹¹. Detailed requirements for nasvai are provided in Article 15 of the draft law. The bill suggests banning all types of smokeless tobacco products, except to allow the production and sales of nasvai. The authors of this initiative still do not have enough data to determine whether nasvai produced in accordance with the established requirements will in fact be more safe than other forms of smokeless tobacco products which may be produced or imported. This approach has no justification in terms of public health protection.

Below is a full version of this bill's Article 15:

"Article 15. Requirements for smokeless tobacco products

- 1.1. Smokeless tobacco products, other than nasvai, may not be produced, imported, or sold on the territory of the Kyrgyz Republic (including storage, wholesale and retail sale, export).
- 2.2. On the territory of the Kyrgyz Republic, nasvai may not be produced:
 - 1) amateurishly at home;
 - 2) without a license;
 - 3) without compliance with the relevant technical, sanitary and epidemiological labor conditions.
- 4) 3. On the territory of the Kyrgyz Republic, nasvai and tobacco may not be circulated for its production purposes (including storage, wholesale and retail trade) without:
 - 4) consumer package;
 - 5) relevant technical certificates;
 - 6) excise stamp;
 - 7) health warnings.
- 4.4. Nasvai supplied for the retail and wholesale trade to the market of the Kyrgyz Republic must be placed in a consumer package permitting writing information for consumers and is subject to being marked as required by this Law.
- 5.5. Information displayed on nasvai consumer package must include:
 - 6) 1) name;
 - 7) 2) net weight details (g);
 - 8) 3) name of the legal entity incorporated on the territory of the Kyrgyz Republic, which is authorized by the producer to deal with

¹¹ <http://www.kenesh.kg/ru/draftlaw/499525/show>

complaints from consumers, its location, including the actual address (if this entity is unavailable, it must be stated that complaints from consumers are received by the producer incorporated in the territory of the Kyrgyz Republic);

9)4) name of the producer, the entity authorized by the producer, its location (address, including the actual one) and (or) the name of the controlling organization (if any), its location (address, including the actual one);

10)5) health warnings;

11)6) information about the content of system poisonous, cancerogenic and mutagenic substances.

6.6. Information not mentioned by Part 5 of this Article may not be displayed on the consumer package.

7.7. Information on the nasvai consumer package must be displayed in the state and official languages on the outer side of the consumer package in clear, legible, readable, indelible letters or symbols resistant to climatic factors. Devices and methods of displaying information on the consumer package must make sure that such information survives nasvai transportation, storage, and sales.

8.8. Information displayed on the consumer package must not be printed on a transparent wrapping film or any other outer wrapping material, overlapped by any other printed information, and may be partly overlapped by excise stamps, except for the face of the consumer package.

9.9. When selling nasvai, it is forbidden to use any inserted sheets placed inside the consumer package, attached from the outside or to the package.

10.10. The consumer package of nasvai supplied for the retail and wholesale trade in the market of the Kyrgyz Republic must have a color corresponding to color Pantone 448 C.

11.11. It is forbidden to use food products, ingredients with a taste of food products (flavoring substances) and dyes, as well as additives enhancing the habituation effect as ingredients.

12.12. It is not allowed to use, as ingredients for nasvai, any other substances, except for those permitted to be used in food products consistent with the laws of the Kyrgyz Republic and the legislation of the Eurasian Economic Union.

13.13. The hydrogen exponent (pH) of the nasvai homogenized mixture and distilled water at a ratio of 1 to 5 must not exceed 6 at the indoor temperature.

14.14. State control (supervision) over compliance of nasvai produced and sold in the territory of the Kyrgyz Republic with the requirements of this Article as well as its storage conditions is exercised by the authorized healthcare and standardization state authorities consistent with the laws of the Kyrgyz Republic."

As of now, nasvai is chaotically produced and is sold on the streets and in the markets - not in retail chains. In case this draft law is supported, the government would have to spend resources for developing standards for making nasvai legal. This product will be packaged and have health warnings, and it is assumed that it would be taxed and be less harmful.

Uzbekistan has applied a similar model of legalizing production of a product popular in the region but produced amateurishly. The new version of the tobacco control law in Uzbekistan was proposed by the Ministry of Health for consideration to the Government in December 2019; it includes provisions permitting legalization of an amateurishly made smokeless tobacco product as well.

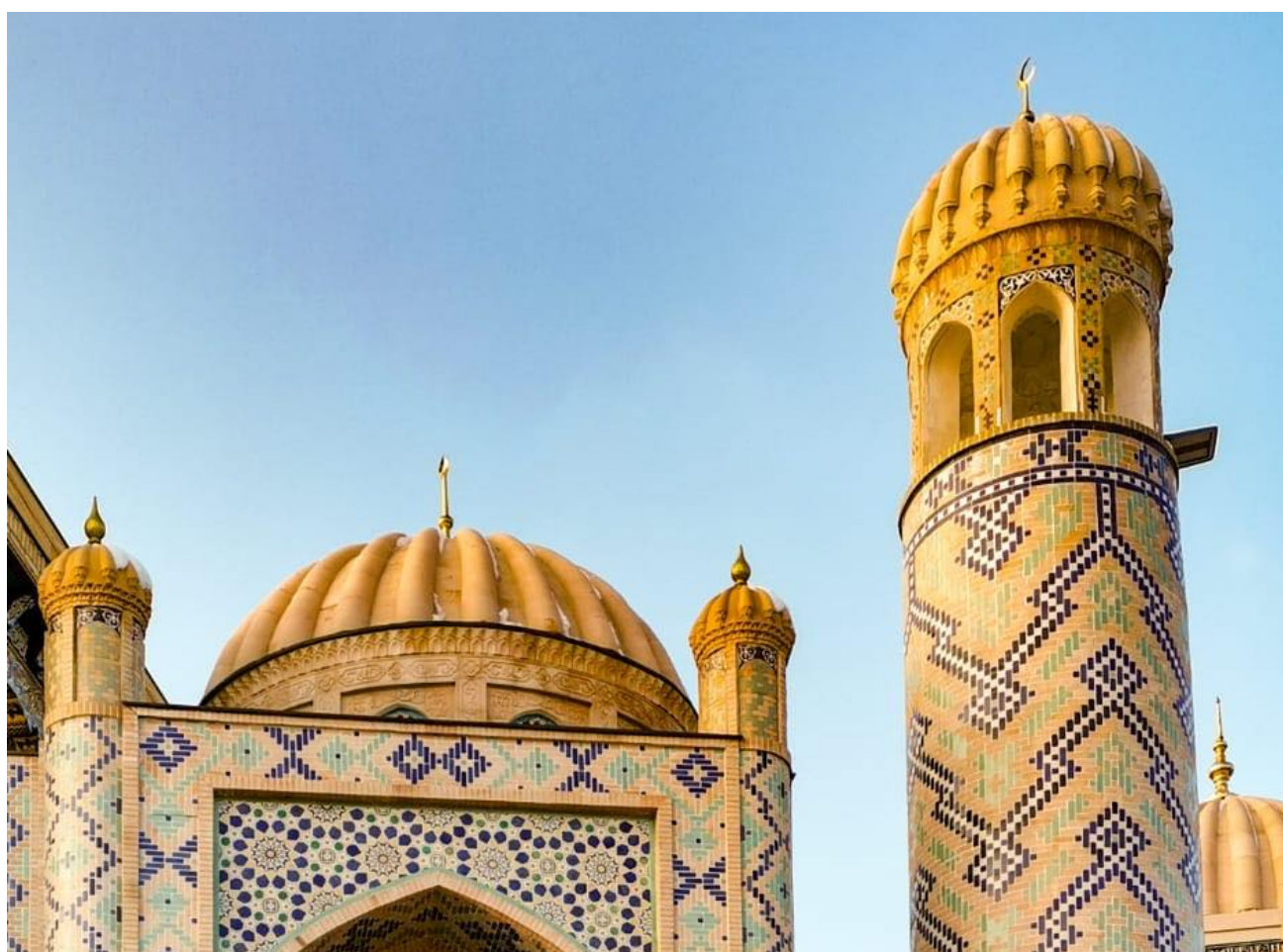
Perhaps refusal to make nasvai illegal can be explained by the level of its consumption in countries such as Tajikistan, which is higher than in the Russian Federation and Kazakhstan, where the law was adopted in 2018. Both Kyrgyzstan and Uzbekistan have draft laws being considered by the Parliament or Government. If this doctrine is successful, we will have positive results of approbation in the region for replacement of a traditional product that is unconditionally hazardous with a less harmful one.

The efficiency of the decisions to legalize nasvai will be evaluated later after: 1) obtaining prevalence data of all the tobacco forms and its dynamics; 2) chemical analysis of nasvai samples in the countries that have imposed requirements for the product; and 3) evaluation of the share of amateurly made nasvai in the market once its legal competitors emerge.

Hookah Prevalence

According to Euromonitor research, the popularity of hookah smoking reached its peak in 2018, especially among young people and middle-income users who like to spend time in hookah bars. Further growth of the tourist industry in the country has also supported this growing demand, making hookah use more affordable. In response, local authorities, concerned about the growing popularity of hookah, have banned smoking in public after the adoption of the law of July 2, 2018: On Restricting Hookah and E-cigarette Smoking in Public Places, which placed it on the same footing as smoking cigarettes, although not prohibiting its use, just as cigarette smoking, in catering establishments.

Regarding novel tobacco products, such as e-cigarettes, products with heated tobacco, or nicotine-containing liquids, there are no official data on their use and no market research has been conducted on these products in the country.



Legislative Measures and Steps Taken by the Authorities to Reduce Smoking Levels

The Government of Uzbekistan had taken legislative measures to reduce the use of tobacco products long before the WHO Framework Convention on Tobacco Control was ratified.

In 1994 the Administrative Liability Code introduced a ban on the use of tobacco products in unidentified places, in local and long-distance trains, on river vessels, in wagons (including vestibules) of suburban trains, in buses whether city, suburban, interurban and international transportation; and in taxis, route taxis and urban electric transport. Violation of this prohibition results in a fine of one third of the basic calculation value (minimum wage)¹².

- I. On August 30, 2002 amendments and additions were made to the Law on Advertising, which prohibited tobacco and tobacco product advertising, among others:
 - gratuitous distribution of samples of tobacco and tobacco products;
 - sponsorship of events that use the name, trademark or image of tobacco and tobacco products;
 - distribution, including the sale of goods: T-shirts, hats, games, etc., using the name, trademark of tobacco, tobacco products;
 - establishment of images, names and other information about tobacco, tobacco products on the facade, entrance/ driveway, shop windows, on exposed items and in other places of commercial facilities.
- II. The State Standard of Uzbekistan for cigarettes¹³ that sets the requirements for cigarettes, including the maximum concentration of tar, nicotine, CO, and the format of warning inscriptions, was developed and introduced by a joint venture UzBAT. It was introduced in 2007 in consultation with the Ministry of Health and contained, among other items, requirements for the packaging and labeling of goods containing health warnings on the front and back of the package (at least 30%). Later, the Order of the Ministry of Health of the Republic of Uzbekistan # 31114 of November 17, 2011 adopted clearer formulations and definitions of health warnings, and approved requirements for the textual content of health warnings that cover 40% of the package surface.
- III. The Law on Restrictions of the Distribution and Consumption of Alcohol and Tobacco of October 5, 2011 bans “the use of tobacco products in the workplace, health care, educational, sports and recreation facilities, and high fire risk locations, including gas stations, and other public places except for specially designated places and (or) premises for the use of tobacco products, as well as in all forms of public transport”. Whereas a fine of one third of the minimum wage was initially imposed only on public transport, the introduction of article 561 of the Administrative Liability Code by Act # ZRU-396 of 29 December 2015 extended this penalty to other public places mentioned in the Act. The Act also prohibits the sale of alcohol and tobacco products by commercial establishments located

¹² As of 1 February 2020, the minimum wage in Uzbekistan was set at 679,330 soums per month.

¹³ The State Standard of Uzbekistan for cigarettes 1140:2009, <https://www.tobaccocontrol.org/files/live/Uzbekistan/Uzbekistan%20-%20Technical%20Standards%20for%20Cigarettes%20-%20national.pdf>

¹⁴ Ўзбекистон Республикасининг “Алкоголь ва тамаки маҳсулотларининг тарқатилиши ҳамда истеъмол қилинишини чеклаш тўғрисида” 2011 йил 5 октябрдаги №ЎРҚ-302-сонли Қонуни ижросини таъминлаш мақсадида Ўзбекистон Республикаси Соғлиқни сақлаш вазирлигининг буйруғи, 2011 йил 17 ноябрь 311-сонли «Тиббий огоҳлантиришлар ва огоҳлантирувчи ёзувлар матнини тасдиқлаш ҳақида»

within a straight line of more than two hundred meters from educational, sports and religious institutions. The Law, however, allows for the arrangement of smoking areas.

- IV. Resolution of the Cabinet of Ministers #199 of June 10, 2016 introduced restrictions on the sale and distribution in the retail trade of alcohol and tobacco products to persons under the age of 2015.
- V. On July 2, 2018 the Law on Restriction of Hookah and E-cigarette Smoking in Public Places¹⁶ was adopted. The law envisages prevention of hookah and e-cigarette smoking in public places (except for specially designated areas for hookah and e-cigarette smoking at regular retail facilities and public catering facilities), as well as prevention of advertising and promotion of hookah smoking and e-cigarettes.
- VI. By its Resolution #74 of 1 February 2019, the Cabinet of Ministers of the Republic of Uzbekistan approved general technical regulations on tobacco products with the maximum permissible content of standardized substances, tar, nicotine and other chemical and microbiological substances. The regulation also describes the requirements for the mandatory use of health warning messages, both textual and pictorial, approved by the Ministry of Health and meeting the requirements of the WHO convention.¹⁷
- VII. Finally, in April 2020, Presidential Decree # ПП-4665 On Measures Aimed at Further Regulation of the Tobacco Market introduced¹⁸, as of June 1, 2020, an excise tax on the import of novel tobacco products, such as products with heated tobacco, nicotine-containing liquids, previously exempted from taxes. The Decree also instructed the Government to submit to the Legislative Chamber of the Oliy Majlis a bill providing for the regulation of tobacco, hookah, e-cigarettes, heated tobacco products and nicotine-containing products.

The current legislation, however, is not effectively implemented in terms of its compliance with the WHO Framework Convention on Tobacco Control. In 2017, WHO assessed the effectiveness of Uzbekistan’s legislation on tobacco control in accordance with a set of MPOWER measures. This assessment was based on the Report on the Global Tobacco Epidemic, and is summarized in Table 4.

Table 4. The current state of MPOWER tobacco control measures in Uzbekistan

Policy	Achievements (maximum of 4)	Current state of implementation
Monitor tobacco use and prevention policies	3	Recent and representative data are available for both adults and youths.
Protect people from tobacco smoke	2	Of eight categories of public places, WHO reports that only one (public transport) is covered by a smoke-free law, and even that only scores a compliance level of 2 out of 10 (scores below 5 are low compliance). A new law banning the use of e-cigarettes and water pipes in public places was adopted in 2018. An age restriction for purchase of tobacco products is in place, although this is apparently not strongly enforced.

¹⁵ Resolution of the Cabinet of Ministers # 199 of 10 June 2016 On Introducing Amendments and Additions to the Resolution of the Cabinet of Ministers # 75 of 13 February 2003 On Approving Rules of Retail Trade in the Republic of Uzbekistan and Rules of Production and Sale of Public Catering Products (Services) in the Republic of Uzbekistan. <https://lex.uz/ru/docs/2983098>

¹⁶ The Law on Restriction of Hookah and Electronic Cigarette Smoking in Public Places. <https://lex.uz/docs/3803255>

¹⁷ Resolution of the Cabinet of Ministers of the Republic of Uzbekistan #74 of February 1, 2019 On approval of the General Technical Regulations on Tobacco Products <https://lex.uz/ru/docs/4187030>

¹⁸ <https://lex.uz/ru/docs/4781721>

Offer help to quit tobacco use	3	Nicotine replacement therapy and/or some cessation services are available (the costs of at least one of which are covered by national/federal health insurance or the national health service).
Warn about the dangers of tobacco	1-2	There has not been a national anti-tobacco mass media campaign during the last few years. Health warnings are present on tobacco packages (40% of package covered, front and back combined), with some appropriate characteristics (WHO, 2018b).
Enforce bans on tobacco advertising, promotion and sponsorship	3	A ban on advertising via TV, radio and print media is in place but does not cover all forms of direct or indirect advertising.
Raise taxes on tobacco	2	MPOWER reports that 35.9% of the retail price of the most popular brand is taxed; however, the specific excise tax is only 19.2% (as against the 70% global recommendation). There has been resistance to raising taxes for cigarettes further: the reason cited is that it may force the population to turn to nasvai (tobacco snuff).

Source: WHO (2017)

As can be seen from the table, the levels of compliance with the Uzbek legislation that correspond to the WHO set of measures are rather low. It should also be noted that since 2018, when this assessment was made, the situation has not materially changed, both because there are now only partial restrictions and because of insufficient implementation of the adopted norms:

- There are still no warning signs at points of sale prohibiting the sale of cigarettes to persons under the age of 20;
- Selling tobacco and alcohol remotely, e.g. via the internet, is prohibited; however, electronic cigarettes and hookahs are offered and even advertised on the internet. (<https://smokoff.gl.uz/ru/>, <https://ogogo.uz/>, <http://uzbekistan.sclub.ru/> и др.)

Only legal entities having a permanent retail facility are officially allowed to sell cigarettes. The criteria for a retail location put additional limits on the tobacco retail trade. For example, if the owner is in violation of the law regarding a customer's age, the threat of closure of his retail shop puts the proprietor under stricter conditions than an owner of a non-stationary point of sale (kiosks), who can quickly change their location. However, many grocery stores and shops registered by individual entrepreneurs sell cigarettes without using cash registers.

Tobacco Market

The legal cigarette market in the country is estimated at 10 billion sticks. In monetary terms, the market grew by 17% in 2019 according to the Euromonitor, reaching a volume of 4.2 trillion soums (USD 420 million).

The major producer of tobacco products in Uzbekistan is JSC JV UzBAT A.O. (joint production with BAT), with an annual production capacity of about 15 billion cigarettes. They had curtailed their tobacco production from 10.4 billion cigarettes in 2016 to 9.9 billion, and its share in the Uzbek market is currently about 90%¹⁹. Unlike all post-Soviet countries, the company partly uses local tobacco leaves at its factory operating in the country.

¹⁹ Tobacco in Uzbekistan, Euromonitor International, 2019

This company remains the dominant producer of popular cigarette brands, offering a full range of price segments that are more affordable than imported cigarette brands. According to Euromonitor only two brands, Kent and Pall Mall, accounted for about 76% of all legal cigarette sales in 2019.

Since consumers pay excise taxes and other taxes (import duty) on imported brands, given the significant devaluation of the Uzbek soum in recent years, prices for local cigarettes produced by UzBAT continue to remain more affordable for local consumers.

In 2015, the Tashkent Tobacco factory was launched in Tashkent. In 2017, Japanese manufacturer Japan Tobacco International provided the Uzbek company with equipment and granted it rights to manufacture cigarette brands Winston and LD. To date, the company controls just over 10% of the overall domestic tobacco market, and total investment in the company amounted to USD 40 million. In April 2019, the factory launched a third production line. This increased capacity allows the company both to sell its products in the Uzbek market and to export. PMI has chosen a similar model of market penetration through contract production of certain brands in the country.

The Food and Agriculture Organization of the United Nations (FAO) estimates that the area under tobacco leaf cultivation has decreased from 10,500 hectares in 2001 to 3,553 in 2017, while its overall production saw a decline from 33,800 tons in 1998 to 5,543 tons in 2017.

Novel Product Market

The country does not have legislative restrictions for the sale of harm reduced products (HRPs) thus far. However, a political rapprochement of Uzbekistan and Turkey may result in the country's following a Turkish model regarding regulating HRPs.

There are no available sources of information on the volume of sales of novel products (HRPs) in Uzbekistan that are considered less harmful and contribute to the reduction of smoking prevalence among the population of Uzbekistan. The HRP product range can be found at <https://smokoff.gl.uz/ru/>, <https://ogogo.uz/>, <http://uzbekistan.ssclub.ru/>. Due to rather high prices for the products and their components, assumptions are that demand at present and in the near future will be low.

No studies of consumer attitudes to HRPs have been done in Uzbekistan. There is also no data on policymakers' attitudes towards HRPs. Given BAT's dominance in the country, as well as its influence on state tobacco control policy, one can predict that HRP products of this company will get quicker promotion in Uzbekistan in the future.

Taxation of Tobacco Products

From 1991 to 2004, Uzbekistan used an ad valorem system of excise taxes, which was later replaced by a specific system of excise tax collection. Between 1997 and 2011, the nominal average excise tax rate increased twentyfold. However, in real terms, following a drastic increase in 1999, the average excise tax rate decreased annually and only saw an increase in 2010-2011. The existing cigarette taxation system favors producers who have started domestic production.

Excise Tax Rates

A current picture of tobacco taxation policy is presented in a recent World Bank survey, which shows that between 2008 and 2017 the specific excise tax for cigarettes produced in Uzbekistan increased more than 7 times. The highest level of excise tax was reached in 2018 (120%). As of 2015, the excise tax for filter and non-filter cigarettes was unified. Table 5 summarizes recent excise rates for cigarettes between 2012 and 2020.

Table 5. Excise rates for cigarettes

	2012	2013	2014	2015	2016,	2017	2018	Jan-2 019	Oct-2 019	Apr-2 020
Filter cigarettes, soum/1000	10739	13424	17451	19196	28794	37432	84222	11790 0	141500	152800
Excise tax increase, %	0	25	30	10	50	30	125	40	20	8
Non-filter cigarettes, soum/ 1000	5183	6479	8423	19196	28794	37432	84222	117900	141500	152800
Imported cigarettes, USD/1000	13	18,2	18,2	18,2	18,2	18,2	60	45	45	30

Source: Decrees of the President of Uzbekistan, site <http://lex.uz/ru>

*Due to the COVID-19 pandemic, the planned increase in April was cancelled, bringing the current rate to 141,500 soums/ 1000 units + 9,0% by the end of 2020.

As noted in Table 12 below, based on the pricing of one pack of Pall Mall cigarettes, with a market-leading absolute market share of about 40% from until 2018 according to Euromonitor, the share of excise tax in its total retail price was 13% from 2010 to 2013. From 2014 to 2017, it increased slightly to 16%. A significant rise in the level of excise tax in 2018-2019 led to its 33% share in the total retail price of a pack of cigarettes. Despite this, compared to many other countries, the share of excise tax built into the price is still low.

Excise taxes on imported cigarettes are set in dollar terms. Prior to 2018, the excise tax was USD 18.2, which is equivalent to 149,700 soums at the exchange rate for that period, or 78% higher than the excise tax on cigarettes produced at domestic factories. After a sharp increase in the excise tax in 2018 to USD 60, the authorities resolved to reduce the rate to USD 30 per 1,000 cigarettes by 2020. Thus, taking into account the current exchange rate, the real level of taxes on imported cigarettes is still twice as high as the excise tax rates for cigarettes produced domestically by foreign tobacco companies.

In June 2018, another specific tax (1 soum per cigarette) was introduced, which is received by the State Sports Development Fund²⁰. The share of this tax in the price of a pack of the lowest price segment in the Sports Fund does not exceed 0.5%.

In March 2019, an ad valorem tax of 4% was introduced, which is charged not on the final retail price of goods, but on the part that does not include excise tax and VAT. Therefore, it represents only 2% of the final retail price of goods.

Since 2019, imported tobacco products of nomenclature 2401 (Tobacco raw materials, tobacco waste) have been subject to a 5% duty on customs value, while customs rates on tobacco raw materials have increased from 10% to 30% currently.

The Presidential Decree on Measures Aimed at Further Regulation of the Tobacco Market²¹, which came into force in April 2020, approved tax rates for imported tobacco products outlined in Table 6, including new nicotine-containing goods (HRP):

²⁰ <https://nuz.uz/obschestvo/30880-sportivnyy-sbor-v-uzbekistane-proizvoditeley-tabaka-i-alkogolya-obyazalioplachivat-razvitie-sporta.html>

²¹ The Decree of the President on Measures Aimed at Further Regulation of the Tobacco Market <https://lex.uz/ru/docs/4781721>

Table 6. Taxes on imported tobacco products effective from 1.06.2020

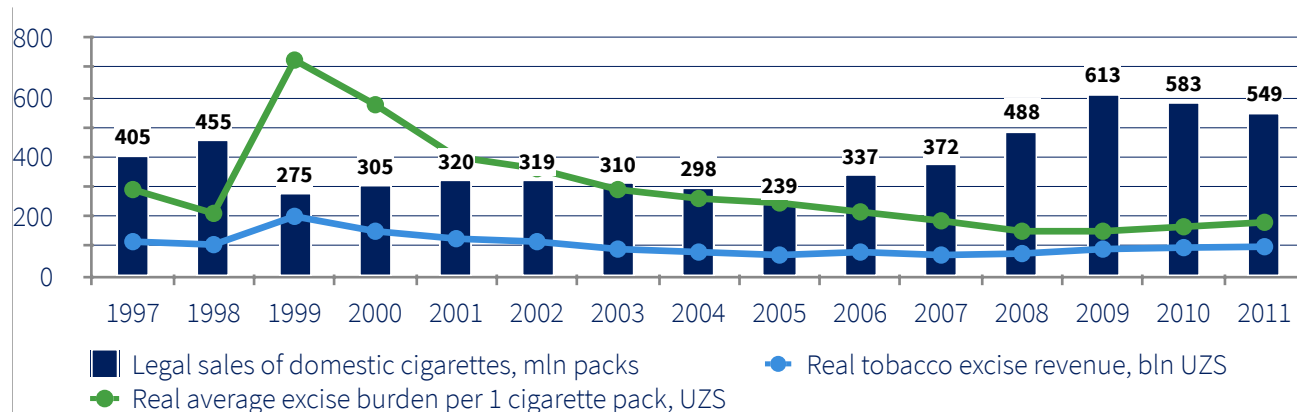
Customs commodity code	Product name	Duty rate in US dollars per unit
2403110000	Hookah tobacco	USD 25 / kg
2403191000	Smoking tobacco	USD 25 / kg
2403991000	Chewing tobacco, dry and moist snuff	USD 25 / kg
241:B 99 900 9	Heated tobacco products	USD 25 / kg
2403999009	Nicotine tobacco-free snus	USD 10 / kg
3824999300	Nicotine-containing liquid (in cartridges, tanks and other containers for use in electronic cigarettes)	USD 0.045 / ml
3824999608		

Setting a lower excise tax level for tobacco-free patches of USD 10 per kg can be seen as an attempt to encourage consumption of this product instead of traditional cigarettes and tobacco heating systems. This tax rate is set at 1 kg, and is 2.5 times higher than for patches. It is obvious that the aggregate tax on imported tobacco products makes them even less affordable to the mass of users in Uzbekistan, thus channeling the demand for domestic products.

State Budget Revenues Over the Last Five Years

The tobacco industry remains one of the most profitable sectors of the Uzbek economy and a major contributor to the state budget. In 2016, for instance, the UzBAT joint venture paid 634 billion soums in taxes, including 284 billion soums of excise taxes to the treasury, according to the company's earlier press releases. In 2017, this figure amounted to 723 billion soums (14% growth), including 411 billion soums in excise taxes (a 45% growth). A number of surveys conducted in Uzbekistan were aimed at analyzing the effectiveness of excise taxes in achieving their goals of reducing the level of tobacco use and replenishing the state budget. Figure 1 summarizes the legal sales of domestic cigarettes, real excise tax burden and real tobacco excise revenues from 1997-2011.

Figure 1. Legal sales of domestic cigarettes, real excise tax burden and real tobacco excise revenues (in prices of 2011) in 1997-2011.



As can be seen from the graph, in 1999, as well as in 2010-2011, excise taxes were significantly increased, and real income increased despite the decline in cigarette sales. Thus, the authors' calculations show that a significant increase in excise rates can both boost budget revenues and reduce the use of excisable cigarettes.

The World Bank, with reference to the data from Euromonitor, the Ministry of Health and other publications, in its review of the effectiveness of tax policy Tobacco Taxation Policy in Uzbekistan²² provided excise revenue and cigarette sales data summarized in Table 7.

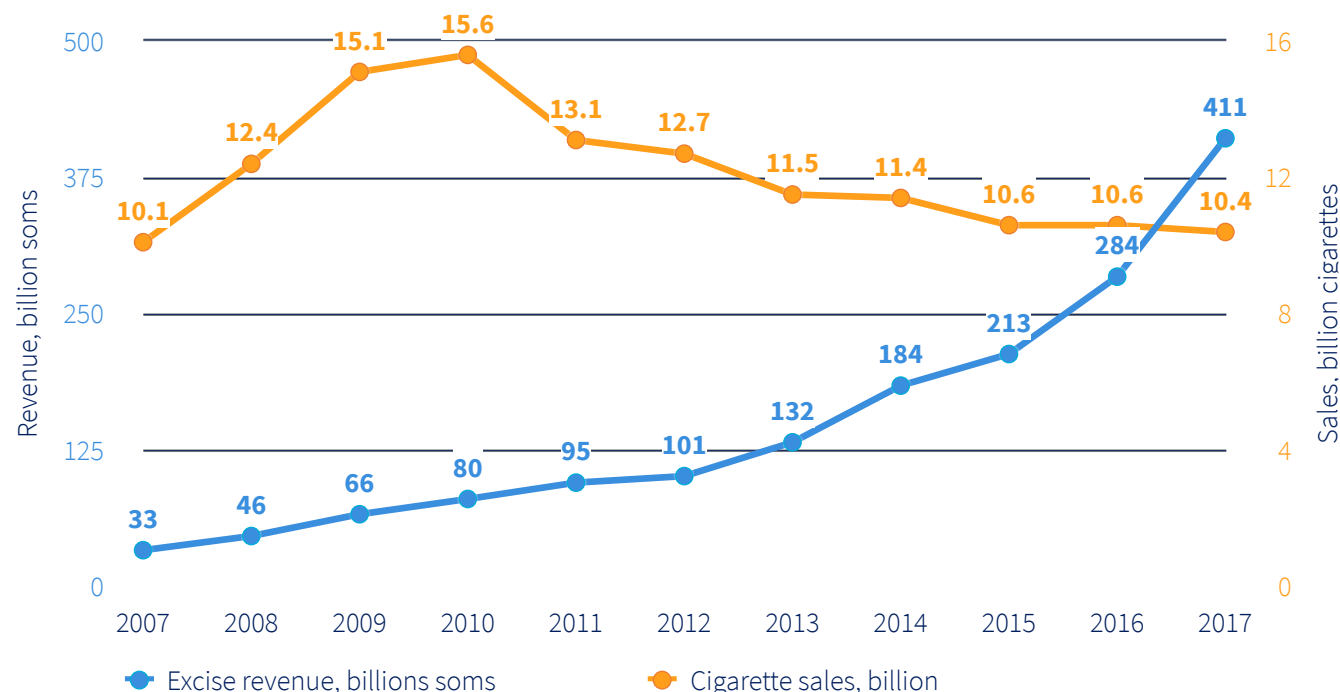
Table 7. Tobacco excise revenue and cigarettes sales

	2011	2012	2013	2014	2015	2016	2017
Cigarettes sales (bln. sticks)	13.1	12.7	115.0	11.4	10.6	10.6	10.4
Excise revenue (bln. UZS)	95.0	101.0	132.0	184.0	213.0	284.0	411.0

Source: Euromonitor, Ministry of Health and media publications

As shown in Figure 2, sales volumes steadily declined from 2011-2017 by 21%, while budget revenues in nominal terms increased by 331%.

Figure 2. Tobacco excise revenue and cigarettes sales (2007-2017)



These studies confirm that excise policies still have significant potential to achieve the goal of reducing demand for tobacco products by significantly increasing tax rates.

Prices and Affordability of Cigarettes

The National Statistics Committee does not provide trends on average tobacco prices, therefore data of the Euromonitor survey were used to calculate annual sales volumes in national currency and quantitative

²² Tobacco taxation policy in Uzbekistan, Country brief. World Bank Group, Global Tobacco Control Program, June 17, 2019 /<http://documents.worldbank.org/curated/en/783351561062937244/text/Uzbekistan-Overview-of-Tobacco-Use-Tobacco-Control-Legislation-and-Taxation.txt>

equivalent for the period studied. Cigarette prices and affordability from 2013 through 2018 are summarized in Table 8.

Table 8. Prices and affordability of cigarettes

	2013	2014	2015	2016	2017	2018
Price of a 20-cigarette pack of the most sold brand (UZS)		2200		3000		6000
Affordability of the most sold brand of cigarettes, RIP (96)*		4.6		4.7		5.8
Sales of Cigarettes (mln. UZS)	2163900	2470900	2688200	3174400	3562300	4224000
Sales of Cigarettes (mln. sticks)	11461.8	114315.0	10638.2	10637.1	10010.6	9900.0
Average price per pack of cigarettes (UZS)	3775.8	4323.0	5053.9	5968.5	7117.1	8533.3
Affordability of the average priced brand of cigarettes, RIP (%) **	7.8	7.4	7.5	7.8	7.6	6.9

Source: WHO, Euromonitor International, National statistic data, author's calculation

*% of GDP per capita required to purchase 100 packs of cigarettes of the most sold brand

**% of GDP per capita required to purchase 100 packs of cigarettes of the average priced brand

The World Bank (WB) survey²³ examines in detail the price pattern of a pack of cigarettes based on the example of the Pall Mall brand, whose nominal value increased 5 times (by 450%) between 2010 and 2018.

This brand (within the average price segment) was chosen because for many years it has been the market leader, and its sales account for about 40% of all legal cigarette sales. The main factor behind its price increase was increases in excise tax. However, the UzBAT manufacturer significantly increased its part of the price net of tax, by 125% adjusted for inflation. In 2017 the price, net of tax, was 4 times higher than the excise tax rate. In 2018 and 2019, excise rates were significantly increased, but the price, excluding tax, is still approximately 50% of the final retail price. Prices and price components from 2013 to 2019 are summarized in Table 9.

Table 9. Price and price components of the Pall Mall cigarettes (in UZS per pack of 20)

	2013	2014	2015	2016	2017	2018	5/2019	Increase (nominal) 2018/2013
Price	2000	2200	2500	3300	4500	6000	7500	3.0
Specific excise	268	349	384	576	749	1684	2358	6.3
Ad valorem excise							150	
VAT	333	367	417	550	750	1000	1250	3.0
Net-of-tax price	1398	1484	1699	2174	3001	3316	3742	2.4
Excise share, %	13.4	15.9	15.4	175.0	44363.0	28.1	33.4	2.1

Source: WHO Global reports on the tobacco epidemic and information from the Ministry of Health, author's calculation

The World Bank cigarette affordability estimate is based on a modified affordability index, calculated as a percentage change in disposable income per capita divided by the cigarette price increase (TAI = (income increase / price index tobacco -1) * 100). A negative value for this index will indicate that cigarettes have

²³ Tobacco taxation policy in Uzbekistan, Country brief. World Bank Group, Global Tobacco Control Program, June 17, 2019 /<http://documents.worldbank.org/curated/en/783351561062937244/text/Uzbekistan-Overview-of-Tobacco-Use-Tobacco-Control-Legislation-and-Taxation.txt>

become less available, suggesting a reduction in cigarette use. Cigarette affordability figures from 2013 through 2018 are summarized in Table 10.

Table 10. Estimates of cigarette affordability in Uzbekistan

	2013	2014	2015	2016	2017	2018
Annual growth rate of GDP per capita (previous year =100)	106,3	106,2	106,0	104,3	102,7	103,3
Consumer price index., all items (December previous year =100)	106,8	106,1	105,6	105,7	114,4	114,3
Consumer price index., tobacco products (December previous year =100)	101,0	105,0	110,4	108,7	119,0	128,0
Average cigarette price annual change (previous year =100)	114,9	114,5	116,9	118,1	119,2	
Tobacco Affordability Index, official CPI-tobacco	12,4	7,1	1,5	3,0	-0,5	-7,8
Tobacco Affordability Index, calculated average prices	-1,2	-1,8	-4,2	-5,2	-0,7	

Source: National statistics committee webs ite <https://stat.uz/ru/>

Illicit Trade

Cigarette prices in Uzbekistan, Kyrgyzstan and Tajikistan remain similar and are low across the region, and so do not motivate illicit trade between countries in the region. However, 3-4% of cigarettes consumed annually in Uzbekistan over the past three years are smuggled. The source of this smuggling is Tajikistan (there are no tobacco factories in that country) and Russia, even though the price for cigarettes in Russia is at least 2-4 times higher than in Uzbekistan. This is evidenced by the health hazard inscriptions on packs, which are mainly in Russian and Tajik. In order to prevent the growth of smuggled cigarettes, Uzbekistan is developing digital coding and tracking of cigarette movement from the production stage to the final sale.

In the first nine months of 2019, the Customs Committee identified 288 cases of smuggling of cigarettes. The number of packs recorded for these cases was a total of 185,93724.

Table 11. Scope of illicit trade in cigarettes

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Scope of smuggling (mln. sticks)	2,140	2,461	1,618	1,248	883	544	468	430	345	282	397.9	421.5

Source: Euromonitor estimates

According to Euromonitor estimates, the peak in the illicit trade of cigarettes fell in 2008-2009. Later, it saw a yearly decline to just 0.28 billion cigarettes by 2017, while cigarette prices in Uzbekistan grew steadily. Over the past 2 years there has been a reverse trend in the market for smuggling, but the methodology for calculating the volume of smuggled cigarettes is unknown.

²⁴ There are ten smuggled cigarettes a year per capita in Uzbekistan. The customs detect only one of them. October 17, 2019. <https://www.ahor.uz/news/na-kazhdogo-zhitelya-uzbekistana-prihoditsya-10-kontrabandnih-sigaret-v-god-tamozhnya-viyavlyayet-to>

Due to low prices for cigarettes in Uzbekistan and a labor outflow from the country, there have been attempts to smuggle cigarettes into European countries²⁵, where they are much more expensive, in addition to the export of cigarettes to countries of the Eurasian Economic Union, where the import, sale, production and storage of the smokeless tobacco product nasvai is illegal. The export of nasvai is conditioned by the demand for it by migrants from Uzbekistan: currently in Russia there are about 2 million such migrants, equal to 20% of the economically active population of Uzbekistan.²⁶

Cessation Programs

A recent WHO report assessing current tobacco cessation programs in Uzbekistan indicates that smoking cessation services are available in some primary health care facilities, and the costs of these services are fully covered either by the national health service or the national health insurance company. Some surveys also refer to Uzbekistan in this context as an example of best practices²⁷, based on the WHO report. However, there is reason to believe that WHO reports are based only on information from the MOH of Uzbekistan, as smoker awareness of these programs is very low.

In practice, even if these services are provided, the population is not sufficiently informed about them, as revealed by a blitz survey of smokers and physicians. These physicians also noted that they are not required to advise smokers, adding that when receiving outpatients or inpatients, they record information on their smoking habits as a harmful habit in a questionnaire and use it as supplementary information in prescribing treatment for an underlying disease. However, more than half of cigarette smokers (52.7%) noted during the 2014 STEPS survey that health care workers recommended that they quit smoking.

Nicotine replacement therapies are available in pharmacies in major cities without a prescription, but their costs are not reimbursable. In addition, there is no free tobacco cessation counselling telephone line in the country. Thus, smokers have almost no access to smoking cessation services. HRPs are not included in smoking cessation programs, and Ministry of Health policy in this issue is based on the agendas of WHO and the Bloomberg Initiative (BI).

It is worth mentioning the cultural factors that hinder the active use of tobacco products. One of them is the tradition of the Uzbek family, where there is still a certain degree of conservatism in raising of children. For example, smoking in the presence of parents or even an older person is not socially acceptable.

Policy Mapping

Chart 1 outlines a map of key stakeholders in Uzbekistan's tobacco control campaign, and their attitudes towards HRPs' role in ending the smoking epidemic. The hierarchy of the stakeholders is based on an analysis of the current tobacco control legislation and the expertise of influential in-country institutions.

Obviously, the Health Ministry, which is very close with the WHO Country Office and the BI, will play a key role in this campaign. The Ministry of Agriculture and Agency of Technical Regulation, which are traditional in-country allies of BAT, can be included in the campaign as well but only at a stage of identifying technical

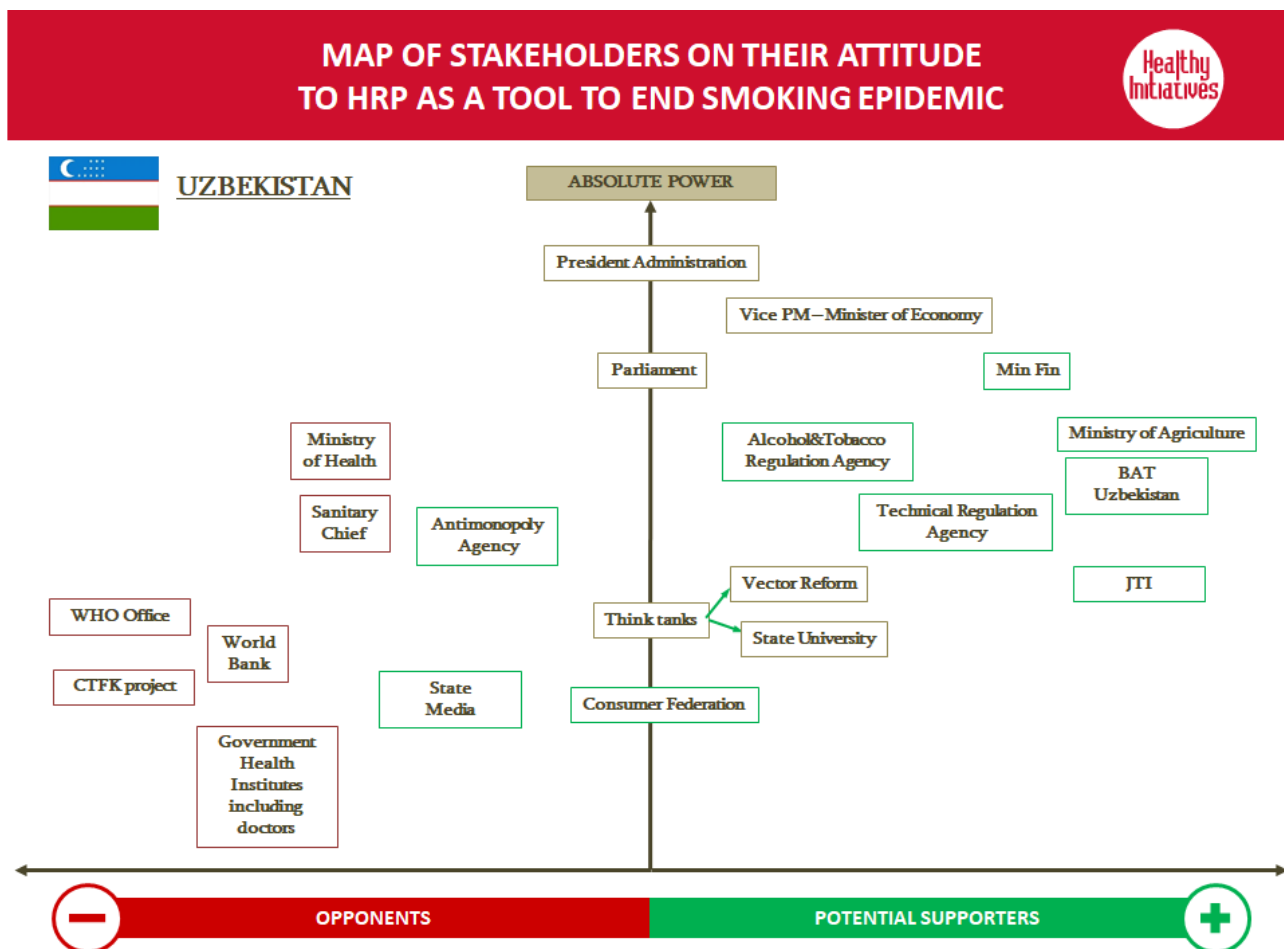
²⁵ <https://nuz.uz/sobytiya/21304-grazhdanki-uzbekistana-pytalis-vyvezti-v-turciyu-krupnyu-partiyu-sigaret.html>

²⁶ <https://uz.sputniknews.ru/migration/20191206/12958308/Stalo-izvestno-skolko-uzbekistantsev-uekhali-na-zarabotki-v-2019-godu.html>

²⁷ Ziborov O.V., Tsvetkov A.Z. International Experience in Implementation of National Measures to Reduce Tobacco Consumption. /Civil Service and Human Resources, #2, 2019.

requirements for products containing tobacco and nicotine. The Agency of Regulating Tobacco and Alcohol, newly created in 2020, is the most interesting and challenging one for future interaction.

Chart 1. Map of stakeholders and their attitudes towards HRP as a tool to end the smoking epidemic in Uzbekistan.



Key Findings

- Lack of official data on smoking prevalence. This makes it difficult for experts to analyze and assess policy measures undertaken by the government to reduce smoking and consumption of smokeless tobacco products. Requests for information from independent experts to the government are unsuccessful, unless backed up by official support from international donors or other stakeholders providing funding to such assessments.
- International experience demonstrates that tobacco use should be monitored on a regular basis, preferably by independent, non-governmental organizations whose mission and competence enable them to ensure the required level of information accuracy and reliability, as well as the ability to lobby for policy measures to achieve tobacco use reduction goals. Current primary estimates are based on the data of STEPS (2014), GYTS (2013) surveys and Euromonitor International data, which are outdated and sometimes contradictory.
- Ongoing policy measures are as follows:
 - A ban on tobacco advertising is effective. The Antimonopoly Committee has had virtually no cases of tobacco product advertising law violations for examination ;
 - Excise taxes have become more effective in recent years: the share of excise taxes in the price for a pack of cigarettes increased from 13% in 2013 to 33% in 2018, which resulted in a 14% decline in sales over this period. However, there is still considerable potential for an increase in excise taxes.
 - Implementation of the legal framework on smoking bans in public places is ineffective. This is because there is no ban on smoking cigarettes in public catering facilities (cafes), hotels, and other public places. Smoking rooms are allowed. Enforcement of the law should be monitored by law enforcement agencies, district authorities, and representatives of NGOs. This requires the introduction of stricter regulatory measures prohibiting smoking indoors, including imposing large fines for owners of facilities who violate the law.
- There is no current information on the behavioral habits of smokers. A survey which sought to identify motivational factors for smoking cessation was conducted in 2007. At that time, physiological (health issues) and economic (higher cigarette prices) factors were identified as the main reasons for use. Since then, the economic situation has changed significantly, meaning that the key motivators have changed for different age groups of smokers. Therefore, before launching another round of public education and advocacy about the health risks of tobacco use, a series of social surveys should be conducted to examine the current practices of smokers and tobacco users, which should use qualitative methods to test various tools for influencing user behavior in terms of their effectiveness in achieving advocacy goals.
- There is a lack of up-to-date data on distribution levels and user behavior in nasvai use. Issues that may call for more in-depth study include the health risks associated with the use of nasvai, its production practices, the practice of switching to nasvai by users who can no longer afford cigarettes, measures to reduce demand for nasvai, and the possible testing of tools to influence user behaviors. As the market for this smokeless tobacco product is illegal, there is a need for policy decisions and measures for its further regulation.
- Family traditions and cultural factors discourage young people from smoking cigarettes in the presence of older non-smokers, and local women avoid public smoking. Today, these factors still have a significant impact on smoker behavior and should be considered in the development of social media and other promotional products.

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Articles

- Most popular directions of Migrants from Uzbekistan <https://uz.sputniknews.ru/migration/20191206/12958308/Stalo-izvestno-skolko-uzbekistantsev-uekhali-na-zarabotki-v-2019-godu.html>
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