

Population (millions)

| | 1995 | 2000 | 2025 | 2050 |
|----------------------|--------|--------|--------|--------|
| All adults, ages 15+ | 68.397 | 69.278 | 69.256 | 62.031 |
| Female adults | 35.473 | 35.677 | 35.138 | 31.471 |
| All youth, ages 0-14 | 13.264 | 12.739 | 9.642 | 8.774 |
| Female youth | 6.457 | 6.191 | 4.676 | 4.254 |

Source: United Nations Population Division, World Population Prospects 1950-2050 (2000 revision)

Real GDP per capita (PPP), US Dollars

| | |
|------|-------|
| 1975 | 15943 |
| 1980 | 17478 |
| 1985 | 19215 |
| 1990 | 20500 |
| 1995 | 22055 |
| 2000 | 24052 |

Source: World Health Report 2002

SMOKING PREVALENCE

Adult (18-59 Year Olds), 2000

| | |
|---------|------|
| Males | 38.9 |
| Females | 30.6 |
| Overall | 34.5 |

Youth (14-15 Year Olds), 2001

| | |
|-----------|----|
| All youth | 29 |
|-----------|----|

Medical Students, 1992-1993

| | |
|---------|------|
| Males | 29.2 |
| Females | 17.6 |

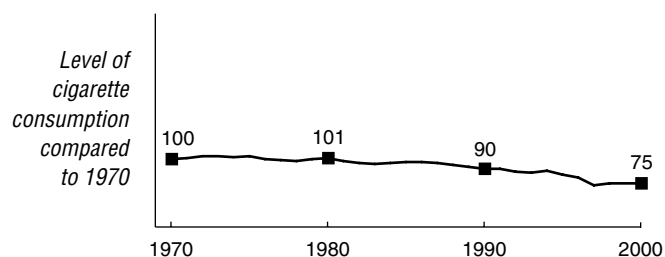
Adult: Population survey on the consumption of psychoactive substances in the German adult population; Reported in World Health Organization. (2002). *European Country Profiles on Tobacco Control, 2001*. Copenhagen: WHO Regional Office for Europe.

Youth: Regular and occasional smoking; Drogenaffinitätsstudie (2001). Cologne: Federal Center of Health Promotion. Information provided by Dr. Annette Bornhauser of the German Cancer Research Center, Heidelberg (September 1, 2001).

Health professional: Occasional or regular smoking (at least one cigarette per day) among students at the University of Ulm; Brenner, H. and Scharrer, S. (1996). Smoking habits of future physicians: a survey among medical students of a South German university. *Sozial- und Präventivmedizin* 41(3): 150-157.

TOBACCO ECONOMY

Annual per capita Consumption, Three Year Moving Average, 1970 = 100



Annual Cigarette Consumption

| Year | Per capita Consumption (cigarette sticks) | Total Consumption (millions of cigarette sticks) |
|------|---|--|
| 1970 | 2333 | 140017 |
| 1980 | 2423 | 154626 |
| 1990 | 2234 | 148893 |
| 1995 | 2297 | 157141 |
| 2000 | 1843 | 127650 |

Annual Tobacco Trade and Agriculture Statistics

| | Unit of Measurement | 1970 | 1980 | 1990 | 1995 | 2000 |
|--|---------------------|--------------|--------------|--------------|---------------|---------------|
| Cigarette imports | sticks in millions | 6141 | 7308 | 10224 | 16485 | 33291 |
| Cigarette exports | sticks in millions | 5002 | 36590 | 65982 | 80344 | 112411 |
| Tobacco leaf imports | metric tons | 138254 | 182787 | 161862 | 173161 | 229040 |
| Tobacco leaf exports (% of total exports) | metric tons (%) | 9351 (-) | 13331 (-) | 15909 (-) | 26361 (0.02%) | 66069 (0.04%) |
| Cigarette production | sticks in millions | 138878 | 183908 | 204651 | 221000 | 206770 |
| Tobacco leaf production | metric tons | 13953 | 10638 | 10441 | 6836 | 10985 |
| Land devoted to tobacco growing (% of agricultural land) | hectares (%) | 6717 (0.04%) | 6313 (0.03%) | 5502 (0.03%) | 3576 (0.02%) | 4576 (0.03%) |
| Employment in tobacco manufacturing | people | - | - | - | - | - |

Retail Price of 20 Cigarettes with Tax

| Type | US \$ | Local |
|----------------|--------|-------|
| Domestic brand | \$3.05 | 3.08 |
| Foreign brand | \$3.15 | 3.18 |

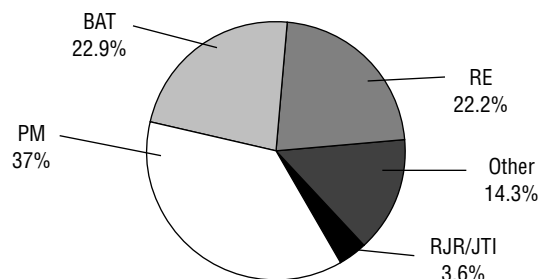
Source: EIU, September 2002

Cigarette Taxes and Duties

| | |
|------------|--------------------|
| Excise tax | 96.9 LCU/1000 cigs |
| Excise tax | 21.96% |
| Sales tax | 16% |

Source: ERC

Market Share by Cigarette Manufacturer, 2001



Source: ERC based on trade enquiries from the first 9 months only

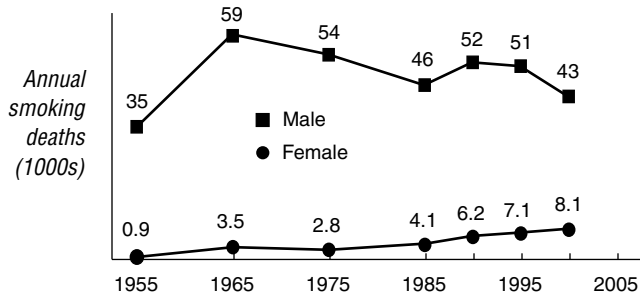
SMOKING-ATTRIBUTED DISEASE IMPACT

Numbers of Deaths Attributed to Smoking/Total Deaths (thousands), 2000

| Cause | Males (by age) | | | Females (by age) | | |
|-------------|----------------|---------|--------|------------------|---------|---------|
| | 0-34 | 35-69 | 70+ | 0-34 | 35-69 | 70+ |
| Lung cancer | -/0.0 | 15/16 | 12/13 | -/0.0 | 3.0/4.5 | 3.2/5.3 |
| All cancer | -/1.0 | 22/52 | 18/57 | -/0.9 | 3.8/35 | 4.4/65 |
| Vascular | -/0.7 | 11/47 | 12/113 | -/0.4 | 2.0/19 | 6.9/215 |
| Respiratory | -/0.2 | 3.7/6.6 | 8.8/20 | -/0.1 | 1.0/2.8 | 4.5/22 |
| All other | -/10 | 6.0/43 | 3.2/37 | -/4.4 | 1.3/19 | 1.9/67 |
| All causes | -/12 | 43/149 | 41/227 | -/5.8 | 8.1/75 | 18/369 |

Source: Peto, Lopez, et al., 1992, 1994 (update 2003)

Smoking-Attributed Numbers of Deaths per Year, Ages 35-69 Only



INFRASTRUCTURE FOR TOBACCO CONTROL

National Tobacco Control Provisions

| Tobacco Bans and Restrictions | Not | | | | Tobacco Requirements and Regulations | Not | | | |
|---|--------|------------|-----------|---------|---|----------|-----------|-----------|---------|
| | Banned | Restricted | Regulated | Unknown | | Required | Regulated | Regulated | Unknown |
| Advertising in certain media | | X | | | Advertising health warnings/messages | X | | | |
| Advertising to certain audiences | X | | | | Age verification for sales | | | | X |
| Advertising in certain locations | | | X | | Manufacturing licensure | | | X | |
| Advertisement content or design | | X | | | Package health warning/message | X | | | |
| Sponsorship or promotion for certain audiences | | | X | | Label design on packaging | | X | | |
| Sponsorship advertising of events | | | | X | Ingredient/constituent information on package label | X | | | |
| Brand stretching | | | X | | Amount of tar | | X | | |
| Sales to minors | | | X | | Amount of nicotine | | X | | |
| Sales by minors | | | | X | Amount of other ingredients/constituents | | X | | |
| Place of sales | | | | X | Product constituents as confidential information | | | | X |
| Vending machines | | | X | | Product constituents as public information | | | | X |
| Free products | | X | | | Constituent disclosure by brand | | | | X |
| Single cigarette sales | | X | | | Constituent disclosure in the aggregate | | | | X |
| Misleading information on packaging | | | | X | | | | | |
| Smoking in government buildings (incl. worksites) | | X | | | | | | | |
| Smoking in private worksites | | X | | | | | | | |
| Smoking in educational facilities | | X | | | | | | | |
| Smoking in health care facilities | | | X | | | | | | |
| Smoking on buses | X | | | | | | | | |
| Smoking on trains | | X | | | | | | | |
| Smoking in taxis | | X | | | | | | | |
| Smoking on ferries | | | X | | | | | | |
| Smoking on domestic air flights | | X | | | | | | | |
| Smoking on international air flights | | X | | | | | | | |
| Smoking in restaurants | | | X | | | | | | |
| Smoking in nightclubs and bars | | | X | | | | | | |
| Smoking in other public places | | X | | | | | | | |

| Other Provisions | Yes | No | Unknown |
|-------------------------------------|-----|----|---------|
| National tobacco control committee | | X | |
| Tobacco control education/promotion | X | | |
| Anti-smuggling provisions | | | X |
| Litigation enabling provisions | | | X |

Refer to Appendix B for more information about national tobacco control provisions.